

# HUMAN DEVELOPMENT

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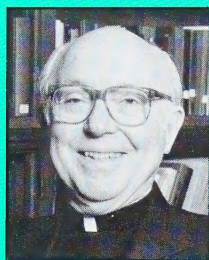
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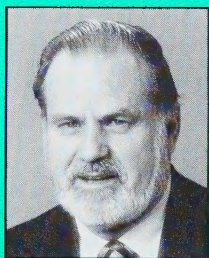




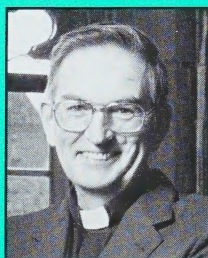
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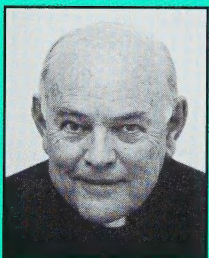
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Authors are responsible for the completeness and accuracy of proper names in both text and bibliography. Acknowledgments must be given when substantial material is quoted from other publications. Provide author name(s), title of article, title of journal or book, volume number, page(s), month and year, and publisher's permission to use material.

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# EDITOR'S PAGE

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## VIOLENCE CHALLENGING US ALL

**S**tanding alone on a silent hill overlooking the campus of Columbine High School in Littleton, Colorado, I looked down on the lifeless, blood-drenched building that a few days earlier was the site of the worst secondary-school massacre in the history of the United States. Two murder-intending boys, a month before their scheduled graduation, brought guns, bombs, and hate to this school with them, spent more than three hours terrorizing everyone in the building, and gloatingly killed twelve students, one faculty member, and finally themselves. They also injured twenty-three other students, many of them seriously. The nation was appalled to learn that this almost unimaginable violence had been planned for at least a year by these cold-blooded young killers. Immediately, millions of people, informed by the media from coast to coast, began asking each other, "Why did this happen again?" Similar deadly events had occurred at other high schools in Oregon, Arkansas, and Mississippi during the past two years.

Thinking about the horrifying sights, sounds, and pains that had been experienced by the students, faculty, and employees in the library, cafeteria, and hallways of the once-lively building below me, I found myself confused by the variety of explanations already proposed by the "experts," who were quick to answer the "why" question for the news media's shocked and mystified readers and listeners. Among the issues they have blamed are the too-easy accessibility of guns; parental negligence; the school's too-large population; insufficient policing; violence-simulating video games, films, television programs, and song lyrics; not enough school counseling; political and religious unresponsiveness to adolescent needs; lack of teacher-student communication; gang membership and activities; tormenting treatment by peers; deep disappointments; serious mental illness;

brain tumors; misuse of the Internet; coming from a family with a history of criminal violence; and physical or sexual abuse suffered as a child.

I personally believe that the common element found in most teen-age shootings is hostility. Whenever hostility is present (the Latin root is *hostis*, meaning enemy), there is always someone or some group regarded and treated as if they deserve to be hurt or destroyed. In Littleton, athletes who had previously bullied the killers were among their targets, along with students who professed a belief in God or belonged to a different race.

Such hatred and its consequences provide compelling evidence that the perpetrators have a deficient sense of their own worth. Unable to love themselves, they find loving others impossible. They blame others for their deep and chronic unhappiness, then lash out at them, even to the extent of annihilation. At Columbine High, the entire student body and faculty were apparently the enemy, and the supply of bombs and bullets the killers brought into the school building could easily have destroyed them all.

While I was walking down the hill, where crosses and flowers had been placed to express the love and compassion of many for the deceased students and teacher, their families, and all those in grief over the slaughter, a mixture of feelings filled my heart. I felt sadness, of course, but also some joy and hopefulness. I had just visited the scene of a martyrdom. The girl who was asked by her killer whether she believed in God and said yes, while looking down the barrel of the gun that instantly sent her soul to heaven, is someone I shall never forget. And the memory of the self-sacrificing teacher who gave his life protecting the students he loved will often bring to mind, as long as I live, our Lord's consoling and inspiring words: "There is no greater love than this, that someone should lay down their life for their friends."

Our images of the heroism of so many of the Columbine students and teachers in the face of such unspeakable terror and carnage cannot help but grad-

ually heal the pain we now feel in sympathy with the surviving students, their teachers, and the victims' families and friends.

My deepest hope is that while researchers in our country and other parts of the world are striving to find out who and what are to blame for what happened in Littleton, at least some of them will take a more positive approach. I want them to discover what persons and what formative experiences helped develop the maturity and heroism displayed by so many that horrible day. We need to learn how to

foster such virtue in the young people in our care. Such knowledge will give us a chance to bring some good out of the evil that all at Columbine High, and the rest of us whose minds and hearts have been drawn there, will never forget.



James J. Gill, S.J., M.D.  
Editor-in-Chief

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# A Close Look at Intimacy

*Leona M. English, Ed.D.*

*When Jean Vanier speaks about that intimate place, he often stretches out his arm and cups his hand as if holding a small, wounded bird. He asks: "What will happen if I open my hand fully?" We say: "The bird will try to flutter its wings, and will fall and die." Then he asks again: "But what will happen if I close my hand?" We say: "The bird will be crushed and die." Then he smiles and says: "An intimate place is like my cupped hand, neither totally open nor totally closed. It is the space where growth can take place." (Henri Nouwen, Lifesigns)*

**I**n this brief narrative about his friend Jean Vanier, Henri Nouwen captures the essence of intimacy. Neither fully closed off nor fully opened up, our intimate spaces are the source of our growth, our relationships with others, and our work. Intimacy with self, others, and God forms the core of our being, yet its achievement is for many of us is a lifelong struggle. For those who live as priests or members of religious communities, the struggle to form and maintain intimate relationships is a constant challenge. The literature on intimacy from a religious standpoint has been rich and varied. There are few of us who haven't read or been exposed to some of it, although we may not have internalized it. In this article I explore intimacy from the perspective of some of the better-known writers on the topic: Eric Erikson, Evelyn and James Whitehead, and Henri Nouwen.

Erikson's standpoint is that of developmental psychologist; the Whiteheads' is that of religious developmentalists; Nouwen's is that of spiritual guide. The treatment each gives of intimacy complements those of the others in many respects while retaining certain unique characteristics.

## ERIKSON'S INSIGHTS

Just about everyone who has studied psychology has become familiar with Eric Erikson's groundbreaking work in developmental stages and its subsequent influence on spiritual writing. Although stage theory, in general, is less and less in vogue, Erikson's insights continue to influence writers of literature for a spiritually hungry audience. He saw the individual as moving consecutively through eight different stages, progressing from one to the next upon successful completion. Each stage contains a polarity or a crisis, though not necessarily traumatic, which must be dealt with. In the stage of young adulthood, Erikson saw adults as ready for intimacy and wanting to commit themselves to a partnership or some form of concrete affiliation. They are ready to develop the inner strength to be faithful to such commitments, despite the sacrifices and compromises involved. In one of his earliest works, *Childhood and Society*, Erikson delineates his theory, saying that people face real fear in this stage—fear of the ego loss



that comes with close associations with others and with self. This ego loss is associated with the self-disclosure that comes with exposing personal brokenness to others.

People who cannot seem to establish the closeness or intimacy required in this period may experience the opposite feeling, *distantiation*—a sense of isolation that may be expressed through physical or mental withdrawal from others, violent or aggressive behavior, combative relationships, or depression. A significant part of Erikson's theory deals with sexual fulfillment, which many people seek during this time in their search for meaning, commitment, and intimacy (here he shows his grounding in Freudian psychology). While some seek lifelong partners, others look to religious commitments or religious life to fill this need. It is truly a search for a place to belong and people to belong to. Many of those who have chosen lifelong religious commitments will identify this time of life as the stage in which they made crucial life decisions. The question in later life becomes, Is this what I need now in my life, or can my need for intimacy be fulfilled elsewhere?

Erikson explains that many people cannot establish mutual intimacy in their lives at this stage for a variety of reasons. The most common of these is an unsuccessful transition from the earlier stages. In the teenage years a person usually establishes a sense of identity, but if that has not been successful, the establishing of true intimacy in later adulthood will be impossible. To know others, a person must first know his or her own self; that is a basic premise of adult spiritual growth.

Not being able to establish intimacy may cause young adults to build up feelings of inferiority that cause them to have poor self-images, which many experience throughout life. While others may think of them as "somebody," they may never see themselves that way. Fears and anxieties may build up and cause them to reject others. Thus, their distantiation may lead to self-defeating behavior. The lasting consequences might be that they will fortify their own territory of intimacy and solidarity and view others with fanatic prejudice. Life then happens to these individuals rather than being fully lived by them. All of us know people who suffer from this inability to be in intimate relationships.

Equally important are the false relationships we establish—which, rather than encourage intimacy, destroy it. True intimacy leads to a sharing and mutual exchange with other people. The inability to share or to be mutually accountable to others has severely limited the capacity of some of us to work and have intimate relationships in our lives. The challenge, for Erikson and for all of us, is to move beyond the self to love others.

## THE WHITEHEADS' VIEW

Evelyn Eaton Whitehead and James D. Whitehead take the theme of intimacy in Erikson's theory further, from a religious development perspective. They show how the struggle for intimacy extends beyond young adulthood and affects all our lives and our ministry. Their concern is how this stage influences or coheres with spiritual development in the adult. Their view, delineated in *Christian Life Patterns*, is that young adults are drawn toward self-disclosure and empathy yet held back by caution and selectivity. Erikson himself points out, in *Childhood and Society*, some of the situations that call for the risking of self-definition, including "close friendships, group solidarity, sexual love and orgasm, social experiences of cooperation and competition, combative relationships, inspiring encounters with others and the experience of intuition with oneself." This risking proves too much for some, and isolation occurs.

Sexuality and intimacy are not synonymous; one does not necessitate the other. This is something that many know but never fully internalize. Furthermore, intimacy is not only positive; it can also be negative, as when it results in combative relationships. Further, intimacy is not only communal; it can also be internal, as is intimacy with oneself.

A significant consequence of failure, as the Whiteheads point out, may be promiscuity, which is a hectic searching for intimacy. Concerned with personal deficiencies and craving some satisfaction, individuals may search for intimacy through casual sex, however temporary and psychologically unfulfilling it may be. They may be viewed by the community as pleasure seekers, which they are, but for different reasons than the community understands.

Perhaps most potent in the Whiteheads' book *Christian Life Patterns* are the abundant biblical images of intimacy. One in particular is found in a quote from Genesis 2:24, in which marriage is described as follows: "a man leaves his father and his mother and cleaves unto his wife and they become one flesh." Another is presented in the story of Jacob, who is attacked by an unknown assailant when he is alone. In the struggle that ensues, Jacob loses a vital part of himself when his thigh is put out of joint. This loss is exactly what happens when we face intimacy: we lose or give up part of ourselves in order to gain more. There is the fear that we may give too much of ourselves, that we may be rejected—that instead of being healed, we may be harmed. The threat of loss of self is focal to every identity crisis.

In *Seasons of Strength*, the Whiteheads build on this idea further but seem more concerned with true knowledge of self—a self-intimacy that they label a



virtue. They define intimacy as “a strength of mature self-love which is the ground for my love of and care for others.” The underlying idea is that once one knows and accepts oneself, one can readily and willingly accept others. The less one needs to keep oneself a secret, the more alert one becomes to Christian maturing. The connection of intimacy with maturity is especially relevant as more and more individuals look back into the past to discover what went wrong in their early relationships and how they can make healthy moves forward, all the while struggling with the primary need to love and be loved—to experience intimacy.

The pearl of wisdom in the Whiteheads’ work is their point that the struggle involves a true conversion to encounter a deeper love and acceptance of self. Maturing individuals begin to see themselves as plural, as having many dimensions, as having a multiplicity of feelings and attitudes—and they begin to love themselves. They can see just what their limits and hopes are. They want to truly possess themselves not only now but also in the future. The Whiteheads point out that this looking inside is not narcissistic; it is not a narrow type of viewing but one that leads to intimacy with God. The vice of self-absorption is counterbalanced by the virtue of self-intimacy—“an identity that unites me to all other living things and, by so doing, tells me who I am . . . and where I belong.”

Looking within causes the person to search repeatedly for an authentic self. It is guided, in a Christian sense, by a conviction of an inner loveliness and an enduring presence. The important point is not that the person can always find the loveliness but that they believe in it. The success of the Whiteheads’ work lies in their adaptation of Erikson—in the way they nuance his theory of development and adapt it to a more personal level. In addition, they take the concept of intimacy, as narrowed to young adulthood for Erikson, and show how it is part of the process of growing older. For the Whiteheads, intimacy does not begin to reach full maturity until midlife. The search for authentic intimacy is an ongoing struggle that affects all of life.

Another significant contribution of the Whiteheads is their application of their theory on intimacy to the current situation of men and women working together in the church, often in what appear to be combative relationships that pit the genders against each other. As the Whiteheads note in *Seasons of Strength*, men seem to perceive women as “other” in the vast majority of cases. This polarization has occurred, and continues, because of the solitary, celibate life for men that has been encouraged, especially before Vatican II. Because some of these men spent much of their educational life set off from women, either in all-

male schools or seminaries, they often felt isolated from women. As more and more women take positions of leadership in the church, we need to resolve this dichotomy by looking at it as an opportunity and invitation for men and women to move ahead together in a shared ministry characterized by an intimacy between ministers. The Whiteheads’ point is well taken: adversarial relationships between clerics and female church workers are all too common and point to an unhealthy resolution of crucial life issues.

## NOUWEN’S EXPERIENCE

Henri Nouwen’s concept of intimacy comes closest to that of the Whiteheads. Although his is more of a spiritual understanding and is geared toward the needs of those who have decided to live a celibate life, he by no means confines his theories solely to that population. Indeed, Nouwen sees the struggle for intimacy as a problem for all people, no matter how they live their lives.

A prolific writer and priest, Nouwen catches the attention and gains the trust of his readers because he himself has lived the struggle about which he speaks. In *The Genesee Diary* he details a personal spiritual experience that occurred when he went to live in a Trappist monastery in upstate New York for seven months. The diary records the difficulties Nouwen experienced in attempting to know himself and God. Having lived a public life, surrounded by friends, success, and popularity, he found the demands of the monastic way of life taxing. Previously in great demand as a lecturer and writer, he had never slowed down enough to really know himself. Perhaps one of his biggest problems was his assumption that once he did slow down and actively search for God, God would come to him.

Much to Nouwen’s surprise, God was not to be found. In the monastery, Nouwen longed for his friends, felt lonely, wanted attention, and desired contact with others. All the trappings of the world stood in the way of his desire for intimacy. Silence, in particular, was a great challenge because it was enforced between 6:30 p.m. and 5:30 a.m. For Nouwen, life as a vegetarian and a pauper who had to do hard manual labor differed radically from his old life. Not surprisingly, he did not become comfortable or at ease until he had lived for several months in his new environment.

Nouwen’s discoveries of silence, quiet, and reflection did not come as readily as he wanted them to; they happened only after much effort, when he “allowed” God to be part of him. Advent marked a special passage for him in that it helped him experience a growing inner stillness and joy, allowing him



to realize that the one he was waiting for had already arrived and was speaking to him in the silence of his heart. Nouwen likened this experience to that of a mother who feels the child growing inside her and is not surprised on the day of the birth; rather, she joyfully accepts and receives the one she has learned to know during her waiting. For Nouwen, Jesus was the one he learned to know while waiting. This analogy explains why Nouwen could not find Christ when he searched outside himself: the Christ he wanted and needed was inside. Surely this speaks to intimacy, which can be found only after we have closely examined our insides.

This profound experience of intimacy did not lead Nouwen to a solitary existence; on the contrary, it brought him closer to the world and into a strong sense of community. "In fact," he wrote, "distance from the world has made me feel more compassionate toward it." This became most clear in his new understanding of prayer. His growing with God created an ever-widening space for others in his prayer, which became prayer for others, not just for himself. Nouwen felt comfortable enough to place his suffering friends in God's presence.

Nouwen subsequently spent time teaching at the North American College in Rome. In a series of four lectures, collected in the book *Clowning in Rome*, he speaks to the religious communities living in Rome. He refers to these nuns, priests, and brothers as clowns because, like circus clowns, they were not the center of the attention; they were on the sidelines. They remind us, with a tear and a smile, that we share the same ordinary human weaknesses and that we all need to deal with sexuality and loneliness. Central to Nouwen's discussion is the idea of intimacy: to be alone but not lonely.

Nouwen develops the idea of being at home with whoever you are. He encourages the idea of creating hospitality within your own heart or house, a metaphor for the individual. Not until people are at home with themselves can they invite others in to share. If people become so afflicted with the cares of the world that fear and anger are focal in their lives, then solitude is impossible. This does not deny the validity of the need for care and compassion with others; rather, it illustrates the need to develop constructive coping techniques. Solitude, for Nouwen, includes reaching inside to inner depths, being with others, and being true friends with them. He emphasizes that being with others can come only after truly being with ourselves. This form of solitude sets people free, allowing them to be in the midst of turmoil and to be signs of hope and courage for others. In short, solitude creates that free community that prompts bystanders to say, "See how they love each other."

This struggle is for everyone, not just for those who live a committed religious life. Describing stages of life, Nouwen notes that the adult stage, covering all of adulthood, finds many people dissatisfied, isolated, and bored with their lives—the result, he maintains, of a lack of intimacy with God and faith. People experiencing such isolation from true love may not even realize what their problem is. An openness to faith and a disregard of fear and depression seem to be the keys to overcoming this, yet many people never reach that understanding.

Nouwen gives the example of the parish priest who lives, works, and socializes in the same environment. The priest feels that he is on duty twenty-four hours a day, never escaping from the pressures of his job. This leads to frustration and anger that prevent intimacy and render him incapable of ministering well to his parishioners. Silence, or the development of silence in our lives, seems to be important in this search for a deepening spirituality. Constant busyness leaves no time for silence—and without it, the spirit dies in everyone, and creative energy flows away. Without silence, we lose our center and become the victims of the many who constantly demand our attention.

For Nouwen, the development of significant friendships is crucial. Each person needs a home—a place where they can be with friends. These friends become extensions of ourselves only if we allow them to be—that is, only if we let them become intimate with us. The tools of spirituality and friendship help to build a fulfilling life that can be of service to others. The most striking example that Nouwen gives of someone who has achieved true intimacy is that of Jean Vanier. Vanier has set up homes for the handicapped, named L'Arche ("ark") after Noah's ark. Because he has taken in the homeless, Vanier is a modern-day Noah, embodying the biblical sense of true love. He has led handicapped people from a world of fear to a world of love and comfort. Vanier exemplifies the truth in Jesus' saying, "Make your home in me as I make mine in you." This intimate place in him we can truly call home—a place in which we have no need to fear or worry.

Nouwen, then, has illustrated how the quest for intimacy with self and God presents a lifelong quest for the average individual. His humility and sharing of his own experience help us realize the magnitude of the problem and how it touches all our lives. His insights offer hope and guidance, especially for those experiencing deep isolation.

## A PERSONAL REFLECTION

Erikson, the Whiteheads, and Nouwen provide us with profound insights into the concept of intimacy



and why its attainment presents such a challenge for everyone. Yet each of these writers approaches intimacy from a different but yet related perspective: psychology, religious development, or spiritual growth. Intimacy is shown to entail dispensing with a self-absorbed sense of self in order to deepen our relationships with others. Adults who enter into a marital commitment require self-intimacy in order to fully share wedded intimacy. In order to be intimate with the people they live and work with, individuals in religious life also need true self-intimacy. All people, regardless of life commitments, require an intimacy with God that may take a lifetime to achieve. As Nouwen writes in *Lifesigns*, "Those who have entered deeply into their hearts and found the intimate home where they encounter their Lord, come to the mysterious discovery that solidarity is the other side of intimacy."

When I first read Erikson's work, I was struck by the truth in his theory on the "intimacy versus isolation" stage. His points about the problems inherent in establishing close relationships with people are evident on a daily basis when one ministers to others. While I was reading about Erikson, a friend of mine suggested that I also read Henri Nouwen's writings, which also examine the problems of intimacy. Nouwen came alive for me because of the spiritual depth of his work and because, unlike Erikson, he deals seriously with the spiritual dimensions of life. I identified readily with Nouwen's reflections on the struggle to really know yourself, to be at home with whoever you are. Self-acceptance is probably one of the most difficult challenges of adulthood.

That Nouwen himself went through crises of his own is a source of inspiration for me. When a person of his ability and depth discloses his own struggles in developing close, intimate ties with God and himself, others are comforted. His writings offer the consolation that we are not alone in our own struggles. *The Genessee Diary* is such a moving and human account of Nouwen's struggle that it is difficult not to read it all in one sitting. Perhaps one of the most inspirational things about his work is that it speaks

to everyone, regardless of religious commitments. His own success in deepening his relationship with God and with himself suggests that any of us can attain those goals. They are not final achievements but relationships that are always in process; continuous work is required.

The idea of being "at home" with oneself before one can let others in is something many of us have given thought to; reading Erikson, the Whiteheads, and Nouwen brings immediacy to this ongoing struggle. It shows that other people can tell so much about what is going on inside us by observing what we do and how we act. The only person being fooled is oneself. If one is not happy or content within, this comes through in how we live. Until one is really comfortable with who one is and where one is going, one cannot welcome people in the true sense of intimacy.

The topic of intimacy and its challenges calls all of us to do a little soul-searching and become aware that all parts of our lives are not perfectly fitted together; they require work, attention, and belief. To grow spiritually, we need to grapple seriously with the issues of intimacy in our own lives.

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# Privileges and Pitfalls in Religious Formation

Joel Giallanza, C.S.C.

**E**ven with all the shifts in emphases and alterations in design that have shaped religious life in recent decades, the process of initial formation to that way of life remains a richly endowed period of grace and growth. Indeed, the church has consistently affirmed the importance of every level of religious formation. Most recently, formation has been described as a “path of gradual identification with the attitude of Christ towards the Father” (*Vita Consecrata*, 65).

Formation is a time of primary privileges but also a time of potential pitfalls. The primary privileges are obvious on occasion, not so obvious at other times. The same is true for the potential pitfalls. This article identifies some privileges and pitfalls experienced by those in postnovitiate formation. Because these reflections could refer to a variety of situations and circumstances, each reader will have to view them through the lens of his or her own culture, context, community, and personal experience.

By “privileges” I mean those experiences of joy and blessing often associated with a sense of progress in the formative process, directed toward a total personal commitment to the Lord within a specific religious congregation. These privileges are opportunities that present themselves as definite possibilities for growth in that process. By “pitfalls” I

mean those experiences of difficulty and lack of clarity that can accompany the various stages of the same process. These pitfalls are occasional stumbling blocks to which those in formation must be attentive, because patterns can develop, even before a person is aware of them, that may lead in directions contrary to the desired commitment. The responsibilities of formators include accompanying those in formation in celebrating the privileges and avoiding the pitfalls.

Formators and those in formation could generate a customized list of privileges and pitfalls based on their own observations and experiences. This article is designed to serve as a general resource for both formators and those in formation as they consider what can and does happen in the process of formation at the postnovitiate level. These reflections are not intended to apply equally to every situation; indeed, they cannot. Nevertheless, the church’s own reflection and experience indicate that there are some universal components within the process of initial formation.

## PAPAL VIEW ON INITIAL FORMATION

Pope John Paul II’s recent postsynodal apostolic exhortation, *Vita Consecrata*, presents a comprehensive view of contemporary religious life in all its



forms. Also, the exhortation offers some perspectives on trends that appear to be emerging for the future. The section on formation reflects recent church developments and writings. One paragraph from the section on “Commitment to Initial Formation” (#65) provides the basic framework for these reflections:

Formation should involve the whole person, in every aspect of the personality, in behavior and intentions. Precisely because it aims at the transformation of the whole person, it is clear that *the commitment to formation never ends*. Indeed, at every stage of life, consecrated persons must be offered opportunities to grow in their commitment to the charism and mission of their institute. For formation to be complete, it must include every aspect of Christian life. It must therefore provide a human, cultural, spiritual and pastoral preparation which pays special attention to the harmonious integration of all its various aspects. Sufficient time should be reserved for initial formation, understood as a process of development which passes through every stage of personal maturity—from the psychological and spiritual to the theological and pastoral. In the case of those studying for the priesthood, this initial formation coincides with and fits well into a specific course of studies, as part of a broad formation program.

This is a particularly rich text. Within it are stated several principles currently shaping religious formation: “formation should involve the whole person”; “the commitment to formation never ends”; “it must include every aspect of Christian life”; “sufficient time should be reserved for initial formation.” While these principles are not necessarily new, attentiveness to their implementation has not been consistent in former eras. Today, even though flexibility and adaptability are built into formation programs to respond to the needs of individuals, these principles cannot be set aside lightly. Revised constitutional texts incorporate these same principles into the basic design of formation programs currently prevalent in religious congregations.

The privileges and pitfalls within postnovitiate formation are framed by the following principle from *Vita Consecrata*: Formation “must include every aspect of Christian life. It must therefore provide a human, cultural, spiritual and pastoral preparation which pays special attention to the harmonious integration of all its various aspects.” In identifying a privilege and a pitfall for each kind of preparation noted, I hope to assist those in postnovitiate formation, in collaboration with their formators, to articulate and assess the process and progress of their growth and development in apostolic religious life.

## HUMAN PREPARATION

The human dimension of preparation for religious life during postnovitiate formation includes all those behaviors and attitudes specifically related to the development of a healthy awareness and knowledge of self. It also includes cultivating one’s capacity for building and sustaining mature relationships with others in community and in ministry. Because this human preparation is foundational to the whole formation process, the personal and relational components within it will be examined separately.

**Personal.** A primary privilege within postnovitiate formation on the personal level is the opportunity for and the adventure of learning new dimensions of self, gaining new insights concerning the way life has developed thus far, and exploring possibilities for the ways it can develop in the future. Flowing from all this is a clearer perspective on the patterns of one’s current and evolving attitudes, motives, and behaviors. This perspective assists the individual in responding to and making decisions about the directions in which life is moving. None of this is meant to imply that the person will like all the patterns observed. In fact, some existent or emerging patterns may be inconsistent with growth in religious life and must be addressed accordingly. The point is to use this time of opportunity and adventure in postnovitiate formation to nurture continued and consistent growth in commitment to religious life.

A potential pitfall within the personal component of preparation is self-centeredness. The individual may become fascinated with and even fixated on everything pertaining to the growth and development of self. This risk is sometimes magnified when the individual receives supportive counseling to address one or several personal issues. Though counseling is not the direct cause of self-absorption, it may feed an individual’s predisposition to such fascination and fixation. Under the umbrella of working on personal growth issues, the individual can communicate a self-focus and self-interest that quickly become wearisome to other community members and ministry coworkers. The person’s world may even shrink to the extent that others find it increasingly difficult to enter his or her life on any significant level. That can be frustrating to those who would appreciate some deeper interaction with the person; eventually, they will lose interest and direct their energies and efforts elsewhere. As long as the individual expresses an insensitivity to the importance of the mutual sharing necessary for healthy relationships, he or she establishes and maintains relational behaviors that inevitably lead to loneliness.



**Relational.** A primary privilege within postnovitiate formation on the relational level is the opportunity to meet new people and to be involved in new situations and experiences. Admittedly, not every person encountered will be new; some may have been part of the individual's novitiate or prenovitiate formation experiences. Similarly, certain situations may reflect earlier engagements. Even if there is some familiar territory in postnovitiate formation, the fact that it is taking place in a different setting, with other formators and different responsibilities, lends a newness to the overall experience so that it does not merely replicate previous levels of formation. Also, as new situations and experiences expand, the individual will meet yet other new people in community and in ministry. Postnovitiate formation, then, is a time for allowing and inviting new people into one's life, a time for knowing and for being known, and a time for nurturing a wide variety of relationships in both community and ministry.

A potential pitfall within the relational component of preparation for religious life is the categorization of others—even recent acquaintances—before they have been given an opportunity for any significant sharing or self-revelation. An individual may characterize others on the basis of past experiences that have no real reference or connection to those being categorized, other than a broad or even vague similarity to earlier relationships. People are generally categorized as either those whom the individual wants to know or know better (these are admitted to an informational and affective “inner circle”) or those designated as having nothing in common with the individual (these are placed outside the boundaries of that circle). Both groups may include community members as well as coworkers in ministry. A further pitfall is the possibility that the individual may use those with whom he or she wants to associate as a crutch or as an escape from confronting and dealing with personal or communal issues. This problem becomes more complex if the preferred associates are outside the local community, thus making the individual something of a mystery to the other members of that community. Another further pitfall, related to those with whom the individual does not want to associate, is the closing of self to a fuller discovery of and involvement with others. This is especially frustrating and disappointing for those who try to establish a relationship with the individual, only to meet with affective distance and lack of openness on any level other than the most superficial.

## CULTURAL PREPARATION

The cultural dimension of preparation for religious life during postnovitiate formation includes all those

behaviors and attitudes specifically related to the individual's identity within the immediate social context. The individual's interpretation of and response to that context's influence on religious life will be nuanced by his or her social, cultural, racial, and theological background.

A primary privilege within postnovitiate formation on the cultural level is the individual's progress in articulating a vocational identity within society and within his or her own subculture. As a temporarily professed religious (or seminarian, in some instances), the individual moves about in society, gradually exploring and enhancing the vocational role to which he or she aspires. That movement, accompanied by feedback from formators and ministry supervisors, enables the individual to strengthen behaviors consistent with that vocational role and to adjust behaviors that are inconsistent. Also, greater clarity is gained as the individual observes how others respond and react to him or her in that role. This clarity is especially important in developing extracommunity relationships and for determining the appropriate boundaries within those relationships.

A potential pitfall within the cultural component of preparation is negligence in assessing the extent to which movement into society affects the value system that must accompany the individual's vocational role. Without attentiveness to the potential for such negligence, compromises can emerge and become patterns of behavior even before the individual is cognizant of them. Often those compromises emerge in the areas of community and prayer. Extensive comments on these areas go beyond the scope of this article, but I will offer a brief example of each.

A compromise affecting community develops when the individual regularly shares or comments on information that is proper to the community with those who are outside the local group. Such sharing and commentary may focus on particular members' lifestyles or idiosyncracies, on aspects of the formation program, or on the formators. This compromises genuine respect for community members and issues and is further compounded if the individual does not share or comment regularly and honestly within the community about the same matters. All kinds of reasons can be offered by the individual to explain and excuse his or her low level of input within community. Nevertheless, living in community as a casual observer and occasional commentator is inconsistent with healthy growth in the common life.

A compromise affecting prayer develops when the individual limits it to academic precision in discussion and technical perfection in practice. This limitation spares the individual any discomfort associated with the affective dimensions of prayer, but it



also removes any human quality from that prayer. This approach can be especially appealing to some individuals when the primary focus of their postnovitiate formation is academic studies. Even though studies are not the origin of such an approach, the individual may use them as a justification for assigning high priority to the academic life over significant attentiveness to the affective aspects of the spiritual life. Prayer then becomes all precision and no passion. Such an approach compromises the development of a healthy love relationship with the Lord through prayer.

These two areas do not exclude the possibility of compromise in other areas of postnovitiate life (e.g., ministry, the vows). Community and prayer are cited here on the basis of my own experience and observation of postnovitiate programs in various places around the world, as well as comments made by postnovitiate formators.

## **SPIRITUAL PREPARATION**

The spiritual dimension of preparation for religious life during postnovitiate formation includes all behaviors and attitudes specifically related to building, maintaining, and nurturing one's relationship with God. These would necessarily include fidelity to the practices and traditions of the religious congregation to which the individual belongs.

A primary privilege within postnovitiate formation on the spiritual level is the opportunity for diversity in prayer, in terms of both content and context. Postnovitiate formation should build upon the novitiate experience so the individual can expand the content of prayer through exploration and experimentation with a wide range of prayer forms, personal and communal. Also, the context for prayer can expand. While there will surely be prayer in the local community and with its members, usually there are the additional possibilities of praying with school or work associates and in local parishes. Also, there are expanded opportunities for spiritual direction and for discussion of spiritual matters with a variety of people. The individual may have the sense of being in a veritable supermarket of spiritual possibilities. There is exposure not only to new ways of praying but also to new and refined ways of speaking about prayer and articulating one's own theology of prayer and the spiritual life. Clearly, during this privileged time, it is important for the individual to determine the content and context in which optimum growth in his or her prayer and spiritual life will be nurtured.

A potential pitfall within the spiritual component of preparation for religious life is the adoption of an approach to prayer that does not truly reflect a solid

commitment to it. Two possible approaches are cited here. First is the "kaleidoscope" approach, in which the individual moves from one prayer form to another, from one experiment to the next, without any serious reflection on or evaluation of what is being experienced and why. In this approach, the individual does not establish a regular and realistic discipline; thus, prayer is constantly changing without a sound and discerned basis for change. Eventually, prayer becomes more an entertainment than an enrichment. Second is the "automatic pilot" approach, in which the individual establishes a basic pattern and practice for the spiritual life and then lets it run itself. At work here is the faulty perspective that prayer and the spiritual life will take care of themselves while other matters are addressed by the individual. However pressing and legitimate those other matters may be, the individual loses sight of the truth that the spiritual life does not have a self-renewing energy source apart from one's personal commitment to it. Eventually, prayer and the spiritual life deteriorate; once realities, they become rarities.

## **PASTORAL PREPARATION**

The pastoral dimension of preparation for religious life during postnovitiate formation includes all behaviors and attitudes specifically related to the tasks and responsibilities associated with the individual's apostolic life. This dimension encompasses whatever level of ministry in which the individual is engaged during the postnovitiate period, as well as any experiences directly pertaining to his or her projected future ministry.

A primary privilege within postnovitiate formation on the pastoral level is the opportunity for learning specific skills and for developing a resource pool of information and experiences to support and enhance one's present and future effectiveness as a minister. Often, the postnovitiate period includes academic or technical studies; thus, it is a time to cultivate and refine skills for learning, analyzing, reading, writing, and communicating one's own principles, priorities, and perspectives for life as a religious and a minister. Closely related to all this is the opportunity for supervised ministry, in which the individual can cultivate the capacity for translating his or her studies into pastoral competencies that reflect sensitive listening and compassionate understanding.

A potential pitfall within the pastoral component of preparation is the loss of balance among the various tasks and responsibilities, so the individual begins focusing on one, perhaps even to the point of neglecting the others. Academic or technical studies,



ministry involvements, community responsibilities, fidelity to personal and communal prayer, and the individual's program for self-care and leisure can engage in fierce competition as attempts are made to assign attention to each from the limited pool of personal time and energy. Discouragement in the face of that competition can loom large and begin to dominate everyday life. This dominance quickly solidifies if the individual chooses not to discuss this dilemma with formators and a spiritual director, who can provide advice and assistance in restoring a workable degree of balance among these varied aspects of life.

## THE LORD'S WORK

Surely there are other privileges and pitfalls beyond those mentioned here. Individuals in formation on the postnovitiate level must examine their own experiences to determine which others might be added and how those presented here might be refined to provide further insights into their experiences. The four dimensions identified in *Vita Consecrata* can be separated only for reflection and discussion precisely because they are lived simultaneously. They so overlap that it would be arbitrary and artificial to designate sharp lines of separation among the human, cultural, spiritual, and pastoral components of postnovitiate formation.

All formation to religious life is built upon the foundational principles that this is the Lord's own work. Even with the rich and multifaceted privileges inherent in postnovitiate formation, the largest and deepest pitfall would be for those in formation or formators themselves to forget that "this is the Lord's own doing, and it is marvelous in our eyes" (Psalm 118:23). Given the constant, engaging, and interesting activities and accomplishments that characterize the postnovitiate period, it is quite possible to lose sight of the fact that growth comes by grace and through the individual's active cooperation with that grace. That cooperation must extend to every dimension of religious formation. Otherwise, the activities and accomplishments of the person in formation will be based on a foundation unable to withstand the pressures that always accompany apostolic religious life.

During postnovitiate formation, intense tasks must be taken up and extensive responsibilities must be addressed. There will be graces within those tasks and responsibilities—some agreeable and some disagreeable. And there is always available grace—that is, the Lord's presence and activity at all times, in every circumstance, even when not perceived. Nevertheless, available grace cannot be taken for granted; it must be identified and integrated if formation is to be consistent, constant, and complete.

"It is clear that the commitment for formation never ends," as stated in *Vita Consecrata*, precisely because the process of transformation into the living likeness of the Lord Jesus never ends. No religious, at whatever stage or age, is exonerated from the task and responsibility of growing humanly, culturally, spiritually, and pastorally. The alternative is a diminishing confidence and competence in one or more of these dimensions of life. Thus, the principles and practices of continuing formation must be communicated from the very beginning, even during the prenovitiate period, and reiterated throughout the individual's initial formation and beyond.

Formation at all levels is the Lord's work. In reminding the Corinthians about the true source of all their gifts and achievements, Saint Paul asks them, "What do you have that you did not receive?" (1 Corinthians 4:7). This question must be asked regularly throughout formation. Whatever the effort expended, task completed, or progress achieved, grace has been at work. What Isaiah observed can always be said of the formation process: "Lord, it is you who have accomplished all we have done" (26:12). Those in postnovitiate formation and formators alike can be assured that grace, in accompanying the Lord's work, will always point out and lead to what *Vita Consecrata* describes as the "path of gradual identification with the attitude of Christ towards the Father."



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# Spirituality for the Future

Kathleen Bryant, R.S.C.

*Many years ago, a bishop on the East Coast of the United States paid a visit to a small religious college on the West Coast. He was lodged in the home of the college president, who was a progressive young man, a professor of physics and chemistry.*

*The president one day invited the members of his faculty to dinner with the bishop so they could benefit from his wisdom and experience. After dinner the talk turned to the millennium, and the bishop claimed that it could not be far off. One of the reasons he adduced for this was the fact that everything in nature had been discovered and all possible inventions had been made.*

*The president politely demurred. In his opinion, he said, humanity was on the threshold of brilliant new discoveries. The bishop dared the president to mention one. The president said he expected that within the next fifty years or so humans would learn to fly.*

*This threw the bishop into a fit of laughter. "Rubbish, my dear man," he exclaimed. "If God had intended us to fly, God would have provided us with wings. Flight is reserved for the birds and the angels."*

*The bishop's name was Wright. He had two sons named Orville and Wilbur—the inventors of the first airplane.*

**T**his story by Tony de Mello, S.J. (from his book *The Prayer of the Frog*), reflects something significant about the way we view the future and how inventions and the science behind them affect our attitudes and our spirituality. I am concerned about how we can maintain a viable spirituality in the face of tremendous change in our lives.

One of the most exciting classes I have ever taken was one on God and the new physics, given at Notre Dame University. Father Kevin O'Shea, a theologian, had begun the study of physics as a hobby. He then

integrated his background in theology and scripture with the findings of physics. What excited me most about the class was O'Shea's ability to incorporate scientific knowledge into his understanding of God and lived spirituality.

## DISCOVERIES INSPIRE AWE

That class shocked me into a new awareness of the cosmos. My sense of the universe had been that of an ordered, predictable entity in which solar systems had defined orbits and movements. I was awestruck and humbled to discover that space and time are dynamic quantities, not fixed realities; to realize that our universe is expanding all the time, and that other galaxies are moving away from us; to learn that our galaxy is only one of some hundred thousand million that can be seen by modern telescopes. Our galaxy is one hundred thousand light years across. If there are 200 billion galaxies with 200 billion stars in each galaxy, Earth being one planet in our own galaxy, where does that put us with our petty biases and rigid mindsets?

Today we experience change and information growth at an accelerated rate. We do not really know what challenges life will present to us in the next millennium. We have probably seen more changes in world governments, economics, technology, and scientific advances than any other generation before us. If we are locked into a particular paradigm without any commitment to expanding our intellectual horizons, we are in danger of becoming irrelevant and fossilized. Our present Pope, John Paul II, invites us to continue learning and adapting to the



changes that new information will stimulate. In a letter in *Osservatore Romano*, the Pope alerts us to the necessity of listening to and learning from the developments in human knowledge, and the need to reflect on their implications for philosophy and theology:

The matter is urgent. Contemporary developments in science challenge theology far more deeply than did the introduction of Aristotle into Western Europe in the thirteenth century. Yet these developments also offer to theology a potentially important resource. Just as Aristotelian philosophy, through the ministry of such great scholars as St. Thomas Aquinas, ultimately came to shape some of the most profound expressions of theological doctrine, so can we now hope that the sciences of today, along with all forms of human knowing, may invigorate and inform those parts of the theological enterprise that bear on the relation of nature, humanity and God.

Scientific discoveries can lead us to a sense of awe and allow us to revel in the mystery of the creative and provident God. Scientists have measured the rate of expansion after the birth of our universe and have calculated a mathematical value for that rate, known as Hubble's constant. Stephen Hawking, at Cambridge University, noticed something extraordinary about this simple number: if the expansion rate had varied an infinitesimal amount in either direction, slower or faster, then the universe would have either collapsed back into chaos very soon after birth or would have expanded too rapidly to permit galaxy or star formation. There is a mysterious perfection in that number. From the beginning, the universe was designed in such a way that eventually life and consciousness would emerge. Kevin O'Shea said that physicists are in awe of this Creator God and shocked at us religious who are so blasé and casual in the face of creation.

## IMPLICATIONS FOR SPIRITUAL LIFE

*One Sunday morning a man was driving his red sports car along country roads. He considered himself a great driver. He was rounding his favorite curve when he saw a car careening out of control coming toward him. A woman swerved out of the oncoming lane just in time and shouted out, "Pig!"*

*The man, enraged, shouted back, "Cow!" He felt smug in that he got her before she got away. He whipped around the curve and ran right into the pig. (Joel Barker, video, *The Business of Paradigms*)*

This man's smug acceptance of what he thought was true resulted in the slaughter of a pig and a mess for his sports car. Today, people are coming around corners, shouting information at us. Do we hear threats or opportunities?

We must continue to make new paradigm shifts as we welcome new information. For example, what we have learned about human beings has forced us to redefine alcoholism. Physiology and psychology suggest that homosexuality is an identity rather than a preference. Anthropologists have facilitated our understanding of culture, and social prophets have awakened our consciousness on issues of racism, segregation, and human dignity. As our consciousness evolves through further insight and discovery, the challenge will be to welcome the shifts in our understanding of ourselves, our world, and, consequently, our God.

What spirituality will enable us to freely question and consider the consequences of new information? In this article I propose elements of a spirituality for an age of change. I have strong feelings about this topic, not only because it is my particular area of study and ministry but also because I see spirituality as having profound consequences for the way we proceed as a church and for the way ministry can either be generative and liberating or be debilitating and oppressive for the people we serve. Seven elements are integral to this spirituality:

- The habit of reflection
- A graced flexibility and mobility
- Respect for passion, humor, and imagination
- Alertness and attention to the Holy
- A discerning heart and attitude
- Regard for the role of beauty and art
- The ability to live with ambiguity and tension

**The Habit of Reflection.** The word *education* comes from the Latin *ducere* (to lead), plus the prefix *e-* (out). In other words, to educate means to lead out (in contrast to the "in" of *indoctrination*). Religion grapples with the ultimate questions of life, death, creation, and love. True religious education leads one out of preconceived notions about God, the world, self, prejudices, and biases. The very nature of this discipline leaves room for mystery, wonder, and speculation.

Theological reflection has been incorporated into formation and ministry training programs. Although some students would treat this exercise as "homework" to be done, theological reflection is not merely an exercise. It is not a technique. It is a way of life. It may well be that the only way to survive the changes ahead is with integrity and grounding in the spiritual life. Reflection on experience frees us to break out of our preconceived notions and enables us to integrate what we experience so that we may own, digest, and process what we do in order to be whole people.



I am convinced that the ability to reflect on an experience, pray over it, and learn from it is the key to a spirituality for the future. No matter what life presents to us, there is a kernel of wisdom hidden in each experience. We believe that "God makes all things work together for the good." Sometimes it takes some reflecting before we can recognize the good.

How often have we allowed ourselves to be passive recipients of what life has to offer? How often have we undergone some exhilarating experience or some devastating trauma and not digested the experience through reflection? The religious person is self-reflective. Unprocessed raw material of life causes intolerable blockages in the minds and hearts of believers. Perhaps you know persons embittered and clogged up by what they have suffered. What if Paul had just gotten back up on his horse? What if Joseph had not worked through his dreams? What if the Hebrew people had just moved on after the plagues, desert journeys, and manna without reflecting as a community on their meaning? What if Jesus had not reflected during his forty days in the desert when confronted with hunger as well as notions of power and prestige?

To be healthy and holy, we need to learn to reflect on our experience, to synthesize it and integrate it. We need to personally appropriate what we have been taught. There must be a movement from head to heart, from assent to commitment, from conviction to passion. Edward Schillebeeckx defines experience as "learning through direct contact with people and things . . . the ability to assimilate perceptions." We learn from our experiences. We assimilate when we interpret life experiences and allow this reflection to color our perceptions and future choices.

There will be no way to successfully negotiate the changes of the future and maintain an authentic spiritual life without the ability to reflect on experience in a prayerful context. I believe that because of this facility of prayerful reflection on experience, no scientific discovery or invention, no scandal or tragedy, no psychological insight or cultural pressure will deny us access to greater truth and deeper spirituality. If we retreat into the familiar out of fear and do not deal with change and information coming our way, we fail to live up to God's invitation to make the material of our life our prayer.

Reflection on experience leads us to new images of God. Since God is mystery and far beyond human comprehension, we will always move toward a God beyond our reach. Clinging to one fixed image of God jeopardizes further personal epiphanies and makes the image of God our final obstruction to truth.

**Graced Flexibility and Mobility.** To deal with paradigm shifts, we need the virtues of flexibility and

openness. To be faithful to our vocation, whatever that is specifically, we need to be ready to move. My favorite definition of vocation is that offered by James and Evelyn Whitehead in *Seasons of Strength*:

A vocation is not a once-and-for-all call in young adulthood (to follow this career or enter this particular lifestyle). It is a lifelong conversation with God. Like any rich conversation, it is patterned by periods of spirited exchange, times of strain and argument, and intervals of silence. In such a developmental vision of a vocation, fidelity is more than a memory. To be faithful entails more than recalling an earlier invitation: it requires that we remain in the conversation. Our fidelity must be mobile because the conversation continues.

This definition of vocation invites us to be open to changes in our understanding of the implications of God's call for us. It is a dynamic and developmental understanding of vocation that keeps us on the move, mobile, and ready for God's next invitation. Without some flexibility and openness, one cannot respond to the call. Because the conversation with God continues throughout life, vocation means change, not stasis.

*Grace Under Pressure*, a study of priests by Dr. John Mayer, revealed that those who were effective were those who took risks. Responses to the question "What gives life to your priesthood?" included "Pushing back the horizon," "Being on the cutting edge," "Getting the juices going," "Being a change agent," and "Finding more hills to climb." Mayer found that the personalities of successful priests have much in common with the personalities of fighter pilots; that is, they are all risk takers. One 47-year-old Southern priest said, "Without change, I think we are dead, basically."

Even if the temptation lingers to keep things as they are or restore them to what they were, the reality is that we can never live in the past or remain unchanged by all that goes on around us. As G. K. Chesterton wrote in *Orthodoxy*,

All conservatism is based upon the idea that if you leave things alone you leave them as they are. But you do not. If you leave a thing alone you leave it to a torrent of change. If you leave a white post alone, it will soon be a black post. If you particularly want it to be white you must always be painting it again; that is, you must be always having a revolution. Briefly, if you want the old white post you must have a new white post.

At a convention of the National Conference of Diocesan Vocation Directors, a panel of parishioners from a large, active Catholic parish was asked what one quality they considered crucial in their future priests. The answer: flexibility. This is a critically



important element of a viable spirituality for the future. Without it, the wind of the Spirit will find no give in our sails.

If the requirement of flexibility seems too demanding, we should talk to the elders who have negotiated change well—especially those older persons who are not bitter but alive and joyful. How did their flexibility enable them to welcome change?

The church has always promoted vocation as mobile in efforts to evangelize. Consider the missionary outreach of the church and an often quoted description of the missionary: “one who goes where he is needed but not wanted, and stays until he is no longer needed but is wanted.”

**Respect for Passion, Humor, and Imagination.** Paul Ricoeur writes, “Too often and too easily, we speak of the need for conversion, when it’s not a conversion of the will that is needed but an expansion of the imagination.” When I consider the role imagination plays in the development of a viable spirituality for our future, I compare it to the role of passion and imagination in the work of scientists and artists.

Often when people challenge me about celibacy and its costs to the individual, I raise the comparable reality found in scientists, artists, and devoted professionals who choose some form of “celibacy” for a greater good. Consider, for example, those who selflessly dedicate themselves to hours of research in their passion to find a cure or to solve a problem. How would each of us score on a passion meter? What impels us to devote energy and discipline in promoting the gospel in imaginative ways that will speak to people of the next millennium? How intent are we on continuing our education through reading, classes, debate, and dialogue? Would the scientific community put us to shame?

The challenge is to be a faithful disciple of Jesus and also a Christian intellectual: to read that book that seems just beyond our intellectual grasp, to wrestle with a question without giving in to the temptation to settle for a quick answer, to make a lifetime commitment to an enterprise that stimulates thought, debate, and question without allegiance to a sect that provides all the answers. Discipleship, unless its enthusiasm is tempered by formation and education, can be dangerous.

How passionate are we about our faith? Would the passion of politicians to win, of investment bankers to go public with a company, of a realtor to move a deal through escrow compare with our passion to promote the Kingdom of God? If so, then our passion for an effective promotion of the Kingdom in a meaningful and relevant manner for the future demands ongoing education. This means signing up for a class

you are not required to take or entertaining an opposing opinion that reshapes your paradigm. Granted, “redeemed passion” needs to be rooted and harnessed in order to be at the service of our life project, but a passion anchored in Christian praxis can still be raging, strong, committed, and fiery. It pushes the imagination to the edges of possibilities. Imagination is fueled by passion.

The dual relationship between passion and imagination is a marriage in which one partner gives the other permission for outbursts of spontaneous and creative energy. In the spiritual life, these outbursts can propel us into more effective ministry or prophetic and artistic works that can engender for others a deeper and richer sense of God. The opposite would be a cultivation of predictable and sterile tasks. Which do we honor: the person capable of great laughter, creativity, and passion, or the one whose fear of the unknown sabotages humor and imagination?

In *Act of Creation*, Arthur Koestler examines the nature of humor and finds that we laugh because two incompatible and incongruent matrices intersect. The realization of this incongruity erupts in a laugh. How free are we to realize new creations, or new possibilities for life, education, and ministry, if we do not allow ourselves to see other paradigms and constructs? Koestler points out that “to cause surprise, the humorist must have a modicum of originality, the ability to break away from the stereotyped routines of thought” in a bisociative act. This freedom to connect previously unrelated dimensions of experience is what gives scientists access to new revelations and cures.

I believe that the same freedom and imagination gave, and gives, the saints new images and experiences of God—new ideas that led to the founding of religious orders. It takes a docile, pliable heart to laugh and to imagine these new possibilities. To quote Mary Neill, one of my teachers at the University of San Francisco, “The devil is a tight diaphragm.” Who are we to take ourselves so seriously? Remember that the ass in the Old Testament gave advice. Jonah was swallowed up by the whale, and Teresa of Avila was thrown into the mud and then told God, “No wonder you have so few friends.” It was Pope John XXIII who could go to bed at night praying, “I’m going to sleep. You take care of your church.”

This humor of the saints is an essential component of an authentic spirituality. Humor can be someone’s salvation and can put life into perspective in an instant. Humor can dissipate tension, alleviate pain, provide catharsis, and tame what might otherwise be aggressive attacks. Laughter reflects



our ability to see ourselves from the outside. Only the human person, and no other life form, has the ability to laugh. Could this not be part of the *imago Dei*? If one of the attributes of God is humor, then do we not have a call to humor, since we are created to present the image of God? We have a certain intellectual autonomy and ability to accept self-criticism that gives us the gift of humor.

**Alertness and Attention to the Holy.** A contemplative stance fine-tunes us to recognize God's presence in our busy lives. Any spirituality that blinds us to reality is bogus. Any spirituality that deadens our senses, clogs up our spontaneity, or forbids us to question does not move us closer to God or the truth.

Stubborn adherence to a particular ideology or spiritual practice can short-circuit authentic religious experience. Instead, we should embrace the quest of Saint Ignatius of Loyola to find God in all things. This is the way of the mystics: to recognize God's presence in all things through the discipline of being alert and attending to the Holy—standing on tiptoe, on the edge of expectation, eagerly inviting God's presence into our lives.

In Southern California, we know that the earth can shake at any given moment. We are probably more prepared for an earthquake than we are for the next hierophany—that flash of a moment in which something sacred shows itself to us.

**A Discerning Heart and Attitude.** How can we, as disciples of Jesus, keep our call alive, authentic, and evolving? If we believe that our vocation is dynamic, then we will see our call unfold in perhaps unexpected ways. If we reflect on our experience prayerfully and integrate it, we will strive toward authenticity in our vocation. How does a vocation not only stay alive and authentic but continue to evolve in faithfulness to all in the future?

Developing a discerning heart so that God's will is almost instinctively recognized is a way of keeping our call authentic and evolving. Discernment is an art that develops from years of practicing fidelity and inner freedom. To remain in conversation with God, listening and responding to the next invitation, keeps a vocation ever changing, ever fresh, ever new. Discernment demands that we sift and tease out the various movements that affect our inner selves. The discerning heart recognizes those movements toward God and those which, however well intentioned, may later be recognized as movements in another direction. "The good is often the enemy of the best," complacent, settled, and content with mediocrity. The fine-tuned, discerning

heart recognizes the best and cuts through the core movements and feelings to detect God's beckoning.

The art of discernment evokes engagement of the deeper self and the intimate movements in one's life and probes the real questions. Jesus provoked questioning and invited questions. He was never one to short-circuit the process of faith unfolding, of coming to one's senses, of metanoia. Jesus knew from his own experience of struggling with his sense of mission and identity that there were no quick, easy answers. In the same way that Jesus learned to follow the leadings of the Spirit, we learn to discern by responding to the movements of the Spirit in our lives. It is learning to say yes even while we struggle with no. Discernment is the art of saying yes to movement toward God. Before the yes can be spoken, it must be teased out, sifted from various influences and contrary movements.

Discernment is a lifelong task of staying faithfully in conversation with God. It does not end with ordination, matrimony, or religious profession. God continues to invite us forward to new insights, to more loving choices, and to places we would otherwise never have imagined. It would be much easier to stay put, but that choice has never had any biblical grounds.

**Regard for the Role of Beauty and Art.** A healthy spirituality includes a place for beauty through engagement with an art form, such as painting, poetry, music, theater, or literature. Art nurtures the soul and enables us to transcend the finite concerns of a busy life. "If we lack beauty in our lives we will probably suffer similar disturbances in the soul—depression, paranoia, meaninglessness and addiction," Thomas Moore writes in *Care of the Soul*.

We practice a kind of self-abuse when we develop only half of our brains. Beauty rounds out those abused places in our lives. What food is to the body, arresting, complex, and pleasing images are to the soul.

Beauty cannot be enjoyed without the prerequisite of discipline. Even enjoying a beautiful redwood tree demands the disciplined stance of attention and observation. The discipline to endure long hours of practice is necessary before interpretation through performance is possible.

**The Ability to Live with Ambiguity and Tension.** To be comfortable with ambiguity, we need a clear sense of self as son or daughter of God. From that grounding in baptismal identity, we have the security to explore all questions. If not, we construct a false sense of self. Without personal appropriation, the tempta-



tion is to live vicariously the spiritual lives of others. Some of the men I have interviewed for the seminary have detailed their spiritual practices but described no encounters with God. The shell that protects them from God is the prescribed spirituality of another person. They tend to absorb vicariously the experiences of other persons as their own, under the illusion that this promotes personal growth. Fear keeps us from venturing into the unknown. False religion gives us the illusion of safety. As John MacMurray writes in *Persons in Relation*,

All religion . . . is concerned to overcome fear. We can distinguish real religion from unreal by contrasting their formulae for dealing with negative motivation. The maxim of illusory religion runs: "Fear not; trust in God and God will see that none of the things you fear will happen to you"; that of real religion, on the contrary, is "Fear not; the things that you are afraid of are quite likely to happen to you, but they are nothing to be afraid of."

The ability to live in the in-between-times, when the truth is not clear about how to proceed, is the true test of the virtuous person. Instead of proclaiming with certainty how things ought to be, the way of the saints is fidelity in the dark night by entering into the darkness rather than retreating into the familiar. During the forty years of wandering in the desert, the Hebrews at times longed to return to Egypt. The temptation to turn back never left them. The asceticism of living with ambiguity and uncertainty about absolutes is the way forward. It is an ascetical exercise because it trains the mind and spirit to probe the deeper questions and implications without the comfort of a prescribed and secure black-and-white answer.

Gerald May, in his book *Addiction and Grace*, challenges us to let God be God rather than an object that could become another addiction for us. He challenges us to be faithful by resisting the temptation to objectify and place in stone the spiritual path:

I, for one, would very much like to have a prescribed method of living that would insure my relationship with God and keep my spiritual growth on track. Although I would probably rebel against some aspects of such a system, I would at least feel certain of its limits and demands. I could adapt to it, make it my normality, and feel secure within it. But addiction to a religious system, like addiction to anything else, brings slavery, not freedom. The structures of religion are meant to mediate God's self-revelation through community; they are not meant to be substitute gods. Doctrines of belief, rules of life, standards of conduct, and reliance on Scripture are all essential aspects of an authentic spiritual life. Sacraments are special means of grace; God acts through them with great power. All these things are vehicles for God's love, but addiction to them makes them obstacles to the freedom of our own hearts.

The ability to embrace tensions and work toward wholeness is an ongoing task of the spiritual life. It is very uncomfortable. It forces us to reflect, to examine, to reconcile opposites. To continue refashioning, redefining, and personally appropriating one's values and way forward is difficult, yet it is the task of adulthood in an age of change. New information will continue to hit us head-on in science, theology, and psychology, and to be reflected through the arts. To continue being educated demands an openness to engaging the tensions in a critical debate—whether internally, through processing and prayer, or externally, in community.

In the church today, the challenge is to hold the opposites in creative tension. It is the image of the cross. We are all too well aware of the polarization, even here in our local Southern California church, between liberals and conservatives—especially reflected in recent periodicals and programs on television and radio. In some of these, there is no engagement with the tensions but rather a defensive protestation of absolute truth and identification with one ideology. The movement toward entrenchment can thus be fueled and may spiral out of control.

As a former California beach girl, I can remember the power of being caught in the undertow, which at first can be subtle but which later can take us far from shore. To get out of a riptide, we must swim against the current for a while until we are back in the main flow. Educated persons recognize, sooner rather than later, which strong yet subtle tides of thought have successfully drawn some of our people into a riptide that has carried them away from the community. Going with the flow—the riptide—was, for them, easier than battling various currents of thought. Those who developed an ability to deal with the tension—the willingness to think, question, and reflect on experience—were not so easily carried away.

The temptation can be to keep the peace; to deny the reality of new information discovered daily; to deny the reality of differing valid viewpoints and opinions. If we have not wrestled with the questions, we don't deserve the peace, however false. We are created to be restless—hungry for knowledge, beauty, and union. Saint Augustine's statement applies to us as well as to the Christians of his age: "You have made us for yourself, O God, and we are restless until we rest in You." Spiritual restlessness reflects the attitude of the pilgrim who is on the way. Curiosity and hunger for books, insights, or the acquisition of new skills are part of being human. Keeping the peace within oneself for the sake of "certainty" is artificial living. It is the reflective,



questioning, probing, creative individual who gives glory to God. To be a robot—arrogant and certain—is a caricature of the human person.

Authentic education is not about absorbing information like a sponge and regurgitating it for an exam. Education has consequences. The more we learn, the more responsible we must be. We have a moral imperative to act, to live out of what we know.

Which books will we read? Which questions will we ponder? Which issues will trouble us? Education equips us to ask questions. We have been schooled in how to use tools that will enable us to move into life critically and responsibly. Our faith demands ongoing formation and education.

## DIRECTION FOR FUTURE

- We must not fear the future or the changes that may occur in the church or the world. Buildings designed to survive earthquakes roll with the undulations of the earth; those that remain rigid break under the strain.
- We must envisage our vocation as a conversation with God that may take twists and turns we do not expect. To be faithful means to stay in the conversation—to be mobile and responsive as our vocation unfolds.
- We must digest our experiences by reflecting on what happens to us so that we learn what is of God and what is not of God. We must learn to discern before making choices, letting discernment be a skill that we hone and fine-tune through our lives until we know instinctively what is pleasing to God.
- We must stretch our imaginations, minds, and hearts to new possibilities and refuse to be shaped by the media, indoctrinated by a consumer market, or passively influenced or tricked into vicarious thinking through radio talk show hosts. We must consider the views and opinions of those with whom we disagree, read books that seem beyond our grasp, and study subjects outside our own fields.
- We should not take life so seriously. Rather, we should cultivate a sense of humor, setting our lives in the context of the whole community, the universal church beyond our parish and our vocation. One of the experiences that impacted my sense of church greatly was my five years in the African bush. It was an immersion in the experience of a greater church, totally Catholic yet non-Western in expression. We must keep the perspective of a

Catholic church with a strong tradition and a long history. The social conscience of the church has evolved, theological thinking continues to develop, and liturgical forms continue to find expression in a variety of cultural contexts. In other words, the church is far greater than our experience in a particular place and time.

- We must wrestle with the deeper questions and not compromise by settling for quick, easy answers. We must take risks that demand creativity and courage, remembering that Jesus encouraged critical thought: “Who do you say that I am? What is it you are looking for?”

There is one thing we cannot be taught. Rudolff Otto, in *The Idea of the Holy*, notes that “the numinous, that aspect of the Deity that transcends or eludes comprehension on rational terms, cannot be taught, it must be awakened.” May our passion for God’s glory, our imagination, and our willingness to reflect on experience brings us into an encounter with the numinous, into some experience of God.

I would like to close with a vocation blessing from Sister Ita Ford, a Maryknoll Sister martyred in El Salvador: “I hope you come to find that which gives life a deep meaning for you. Something worth living for—maybe even worth dying for—something that energizes you, enthuses you, enables you to keep moving ahead. I can’t tell you what it might be—that’s for you to find, to choose, to love. I can just encourage you to start looking and support you in the search.”

## RECOMMENDED READING

- Davies, P. *God and the New Physics*. New York, New York: Simon & Schuster, 1983.
- O’Shea, K. *Person in Cosmos: Metaphors of Meaning from Physics, Philosophy, and Theology*. Bristol, Indiana: Wyndham Hall Press, 1995.
- O’Shea, K. *Person in Analysis*. Bristol, Indiana: Wyndham Hall Press, 1996.
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# The Perils of a Sabbatical

*William J. Sneek, S.J., Ph.D.*

**N**o one had warned me.

My college generously funds a study leave every seven years: one semester at full salary or an entire academic year on half pay. Not every teacher is automatically so blessed, for each must submit a research proposal to a committee of colleagues, who sift and sort out those to be recommended for time away. When I happily announced my good news of a full year's grant, faculty friends responded with sincere congratulations and feigned envy. Energizing words beginning with *re-* were in my mind and on everyone's lips: renewal, revitalization, recreation, retooling, revisiting roots, restoring vision, rekindling hope, refreshment, reenergizing.

All these expectations did ultimately materialize, but then there were the outcomes no one had warned me about—outcomes I should have anticipated on my own, given my training as a psychologist.

Reading and consulting veteran faculty as well as friends in other professions had led me to anticipate a foretaste of heaven on earth, a bit of paradise in this vale of tears. Nevertheless, the experience of annual eight-day retreats in solitude, plus two thirty-day-long silent retreats, should have reminded me that many spirits get stirred up when one retires from the daily routine and faces oneself and God. Not without reason do spiritual writers use metaphors like the desert or dark night, or paint pictures of demons' assaults, when describing serious confrontations with the self. But I am getting ahead of myself in the story.

## PLANS VERSUS REALITY

I eagerly planned my life's first sabbatical after twenty-two years of priesthood. Previous changes of assignment had prevented accruing sufficient years of

service in any ministry to be granted a sabbatical. Now I was ready, or so I thought. Fall semester would find me in a theological school on the West Coast, becoming acquainted with recent post-Vatican II developments and with California scenery, sunshine, and culture. Winter and spring would take me to Zürich for research into my academic projects on the thought and therapy of Carl G. Jung. Thus would I nourish my two sources of professional activity, the teaching and practice of pastoral counseling.

I spoke previously about the *re-* words; now its time to introduce the *d-* words: depression, doubt, desolation, despair, darkness, demons (already hinted at), doom, death, denial. When I was slogging through inner torment and turmoil, I asked a spiritual director within the sabbatical program, "Is what I'm foundering in peculiar to myself? If others have trod similar paths, why have I not heard or read about such journeys?" She assured me that I was by no means alone in my reaction, but said she too was unaware of any writing concerning the dangers of a sabbatical. Her encouragement to share my experience has, in part, been the genesis of this article.

The first sign of negativity surfaced as I prepared to leave for the West Coast. Taking leave of family has become not so difficult over the years, at least for myself; Jesuits are constantly on the move. The second rule of the *Summary of the Constitutions* states, "Our vocation is to travel to any part of the world where there is hope of God's greater glory and the good of souls." I'd always quipped that I kept that rule the best. The problem arose when students and colleagues began arriving at school for a new academic year, to be experienced, enjoyed, and suffered through—without me.

Hence, the first pain was separation, especially from the students I'd gotten to know "on corridor,"



where I'd served as their faculty-resident chaplain. Summer sagas were being swapped, along with hearty farewells to me, but I wasn't faring well just then. I recalled a comment by a missionary departing for Asia: "After the bags were packed and sent, and I waited to follow my luggage, a part of me wanted to call the whole thing off." What a strange and unpropitious beginning for a sabbatical adventure so carefully planned, discerned, and anticipated over many years. Well, this would pass, I knew, once I got going and arrived in my new surroundings.

## SURVIVING PARADISE

*Then the devil left him, for a time* (Luke 4:13). Late summer beauty and West Coast hospitality greeted me. A puzzle that had bewildered me for years was solved in a day and a half: How could people stand to live in an environment subjected daily to possible earthquake and annually to devastating forest fires? The answer lay in the warmth of the weather and the people, the profusion of flowers, the vistas on the coast and inland, the West Coast lifestyle. Some of the *re-* words began to come alive as I explored the area on foot, enrolled in courses, mined the library, and made the acquaintance of other sabbatical searchers within the school community of younger developing theologians.

All was well for a few days as fall startup energy galvanized projects and new relationships. Yet I had to admit to myself that I was homesick. Never in my religious or priestly life had I felt so torn from the bond of relationships, from the daily presence of family, friends, colleagues. Memories of going to summer camp for only a week between third and fourth grade resurfaced for the first time in decades. I tried to tease myself out of such "childish" feelings, but to no avail. What and whom did I miss? Family, familiar faces, students certainly, but also my work as a teacher, therapist, dorm counselor, and weekend retreat leader—all were to be snatched from me for a whole year. In place of the active rhythms and daily interactions, I faced library bookshelves; a pile of computer paper to be filled with my wise words; and new women and men to struggle with, to build community and relationships with for several months, and then to separate from.

What to do? The extrovert in me plunged into classes, organized sightseeing jaunts, tried to ignore the temporary nature of our learning community, and sought to deepen new friendships. Yet lacking definite deadlines, and faced with many quiet hours and days devoted only to research, reflection, and writing, I was overwhelmed by waves of homesickness. The cloudless skies of my outer world contrasted strongly with the cloud over my heart and mind. Homesickness evolved into anxiety and depression as news came of distant family members' illnesses and sor-

rows. These were not new stressors, but somehow my being so far away, and having less to "do" plus more time to think, drew me to their misfortunes.

Fortunately, the school offered a voluntary reflection group for sabbatical folk, which I joined. Reading beforehand about the group had led me to believe that its focus would be academic: we were to share our projects, learnings, and research efforts. Instead, the members turned to surfacing the inner struggles occasioned by our sabbatical. We were not a therapy group, but our discussions were more personal than would be usual in a research seminar. This group, along with individual spiritual direction, helped me survive paradise. Yet my psyche was relentless: not content with playing somber inner music, it served up nightly doses of stomach acid that woke me several hours after retiring. In a situation of nourishment and plenty, it seemed to be complaining that it wasn't "stomaching" the diet.

## INNER EXAMINATION

I couldn't figure out what wasn't working. Daily prayer, spiritual direction, inspiring teachers, gifted colleagues, meaningful projects, a rhythm of exercise, work, and recreation were all in place. Yet on one level I was miserable and worried that I might be developing an ulcer over it all. I was truly a mystery to myself.

"Counseling seems called for," one professional inner voice suggested. Still, I hesitated, because I would have to uproot myself again before Christmas. I compromised with a promise to enter Jungian analysis in Zürich if things didn't resolve themselves. Meanwhile, over-the-counter remedies were not helping the stomach acidity problem, so a local physician prescribed stronger medication. Back home, I had rarely needed to consult doctors—another indication that I had embarked upon a health-threatening venture, something more than mere situational depression. "Where has my bliss gone?" I mused. When would I experience the *re-* promises instead of the *d-* days?

One clue surfaced: happiness returned, or at least the dark mood lifted, when I interacted with people, but solitary work cast me again into the pit. This was not a consoling realization: my time away had been "earned" through a promise to do research and writing. In justice, I had to and wanted to fulfill that commitment. Yet when I was quietly alone with my thoughts, dank vapors surged up from inside. Was I afraid to face some hidden truth—a repressed memory, perhaps? No, because I willingly questioned the mood and sought insight, but instead of clarity was rewarded with increasing gloom.

I did recall a point made by my spiritual director at home, just before my departure: today many need to break the productivity/self-worth link. Could my anxiety and depression *cum* incipient ulcer be urging



me to discover genuine joy in being, not doing? This advice seemed true enough, but not sufficient to dispel the symptoms. Needed: more reflection.

Another factor contributing to my malaise emerged: I felt guilty enjoying the leisure, even though I “knew” better. Volunteering for a service project dispelled the feeling temporarily whenever I sallied forth from the library to assist the needy, but it was insufficient to dispel the guilt permanently. How strange this all felt: interior emotional weather unlike anything ever previously encountered, and in such contrast to my picture-perfect surroundings. I wrote in my journal, “Jesus, teach me how to be fallow. It’s *tough!* My head says that folks would ‘kill’ for an opportunity like this. I *am* grateful for this time: make me *feel* grateful too.”

A call from my spiritual director at home confirmed my opposition to needless guilt: “Renounce the work ethic on which we were all raised and go smell the flowers,” he urged. “We are all ‘unprofitable servants,’ working, producing, or resting. Taking this break doesn’t make you into an unprofitable servant.” Such loving, wise advice produced a needed shift in perspective and routed the guilt but was powerless to quell the depression and anxiety. I wondered, Do I live my fast-paced life at home so as to flee all these inner demons? Well, I’d try to face them.

Could the problem be merely the result of the transition? I recalled first years in previous assignment changes: three times I’d suffered similar, though less stormy, inner emotional weather until adapting after the calendar turned. Not much help here: I had only this year, with another switch in the middle. How could I make the most of this precious time if a whole year was required for me to feel comfortable?

My new spiritual director challenged me to accept God’s acceptance. After our session, I prayer over the moments of intimate graced memories with God, both in solitude and in service. Could Jesus’ love be enough for me, a self-described celibate lover? He had always been more than enough: energizing, consoling, encouraging, empowering for ministry and growth through suffering. Jesus could be counted on to get me through my sabbatical.

This realization stimulated me to rededicate myself to the enterprise, but the dark moods still clogged my days and drained energy from my primary focus on research and writing. Somehow I felt as though I were living in a different mind and body than my own. Other tactics gave temporary relief but were no match for the powerful grip that depression and anxiety held over my spirit. I tried generating acts of gratitude and thoughts of my many blessings. As a psychotherapist, I had experienced the positive impact of such techniques in cognitive-behavioral therapy with depressed clients. They left me unmoved.

From a colleague with whom I had taught a course

in counseling techniques, I had learned that going with the flow of one’s confusion or pain and letting reasons for the suffering and a course of action surface is often more productive than fighting the inner states. Sounds great; works fine with my clients; I, however, was powerless to implement that wisdom.

My inner life seemed a contradiction to William Glasser’s contention, in his book *Reality Therapy*, that human change is analogous to driving a car: we can directly affect the two “front wheels” of thought and behavior, and the “rear wheels” of feeling and physiology will follow automatically. My own “rear wheels” seemed to have a driver of their own. Besides that, I still hadn’t found the thoughts and behavior to brighten my affect and reverse the ulcer’s development.

A technique that I had taught in workshops on dealing with difficult emotions involved a breathing exercise linked with imagination: picture inhaling God’s love (or Holy Spirit) and exhaling the painful affect. This provided temporary relief only, not a permanent “cure” or even a return to my presabbatical state of soul.

Comic relief was provided by an old Lithuanian proverb quoted by my mother, freely translated as “Don’t give anybody the satisfaction of putting you into a crazy house”: *Anybody*, of course, could refer to problematic relatives and colleagues or to me, acting against myself with unrealistic expectations of sabbatical bliss or genius productivity.

A midsemester discussion with our research seminar/support group revealed how disoriented and depressed some of us were and identified four factors contributing to our malaise: lack of role; absence of our usual social support network; few (and only temporary) service opportunities in lives otherwise intensely apostolic; and old-fashioned loneliness. Arriving at these clarities provided the relief that merely naming any malady can offer, but it did not permanently change the inner winter weather to spring.

My own mood improved as a result of brief family get-togethers over Thanksgiving and Christmas, plus the successful outcome of surgery for a close relative, but leaving the California sabbatical community and proceeding to Europe proved wrenching.

## BETTER IN SWITZERLAND

*Caelum non animum mutant qui trans mare currunt*, observed the Roman poet Horace: “Folks who scurry over the ocean change their surroundings, not themselves.” Zürich provided as welcoming an environment as had California: a friendly Jesuit residential community of scholars committed to producing a biweekly journal of cultural commentary, a sophisticated city with environmentally sensitive inhabitants, and—most important for my research project—the Jungian Institute, with its four hundred students, research library, and classes and lectures in four languages.



A new year's resolution/insight helped the transition: allowing myself to become depressed or worried just wasn't practical and didn't accomplish or change anything. I would try to transcend the doldrums.

In early January I made the following entry in my prayer journal: "Remember past periods of pain and suffering, and how Jesus and I got through these troubles together, and even grew from the experience." This could translate into "mining" the consolations about which Ignatius speaks as being stored up for times of desolation (rule 10 of First Week Rules for Discernment of Spirits).

The depressing *d-* words followed me to Europe; poet Horace was right. Time to act, to take a deeper look at my inner self. Through a combination of twice-weekly therapy and ulcer medication, things began to improve, but not before a formal discernment about returning to the United States for medical and psychiatric intervention was vetoed.

A dream presaged the turnaround. In it, I entered a candy store operated by Pope John XXIII and spoke with him. "I'm struck by the fact of your running a mere candy store, though you were once pope," I said. He replied, "As a Jesuit, you have a vow of obedience to the pope. So I thought you would pay attention as I invite and ask you to see, appreciate, and acquire the 'sweet' things in your life here in Zürich. God wants you to discover joy. He'll show you." This "prophecy" was proven true over the subsequent months. Many of the lessons learned, especially through Jungian analysis, were personal, but the following may be useful for other sabbatical sufferers.

## REALIZATIONS DISCOVERED

Accepting that my writing projects were intended not to prove my scholarly worth but to share with others what I'd found dissolved the writer's block. I could relax into productivity instead of demanding it of myself.

I count. I am valuable in God's eyes, independent of my productivity or any feedback from success in work or from students, colleagues, counselees, myself. Perhaps such a conviction can grow only when productivity and applause are cut off for awhile.

Slowing down and emptying one's life of the usual can force one to examine automatic life patterns. As this narrative illustrates, such reflections can be "dangerous" and most assuredly not fun, but they may lead to refocusing after healing work is undergone.

Rather than trying to master depression with medication, I learned the truth of Carl Jung's teaching that depression signals a call, a breakthrough to a deeper life. The promises of the *re-* words were fulfilled through entering into the *d-* experiences and sloshing through the latter into healing by means of greater self-awareness.

Resistance to and guilt over focusing on my "little" pains evaporated after the analyst reminded me of two

truths that I teach in my own courses: (1) everyone's pain is real and worth healing, and (2) since we're all connected in the Body of Christ, when we concentrate on ourselves, we affect the larger human community.

Through the process of dealing with past and present pain comes the dawning realization of past and present gifts: talents, one's personal history, family, and friends, appreciated afresh because they are temporarily at a distance. Perhaps *the* gift is the very process of facing oneself and one's issues.

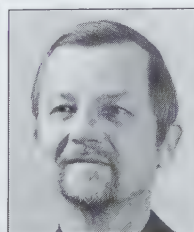
A few sentences from a letter to a female friend cast much light on my mystery and may hold a key to others' dangerous sabbaticals: "My issues concern pain from childhood and throughout my life which, in a male way, I simply 'toughed out' and walked away from, or perhaps ran away from through hard work. This sabbatical time has slowed me down, and all the 'forgotten' pain has caught up with me, stirred up nightly stomach acid and daytime depression."

During a Holy Week pilgrimage through Italy (Venice to Assisi to Rome), I celebrated these insights and the physical/emotional healing they heralded. Recruited to distribute communion at the papal Easter Vigil mass, I reflected that my inner journey had brought me to the heart of the Christian world to share Christ's body, as I had participated in his passion along the way there.

My sabbatical precipitated a crisis in my psychospiritual development. I am told that the Chinese pictogram for *crisis* includes two signs: one indicating "danger," the other "opportunity." Beforehand, I had anticipated neither crisis nor danger, only opportunity. Ultimately, although the year's experience plunged me into the dangerous aspect of crisis, it became a much richer opportunity than expected.

## RECOMMENDED READING

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# Revisiting the Four Horsemen

James Torrens, S.J.

## My Half-Life

Phone after phone here fails to work.  
Someone I hold in awe I just blew up at.

Students are waiting for me somewhere.  
Where?

The curtain is about to open,  
though I have learned no lines.

Here comes my mother with her laugh,  
unaccountably alive.

I'm flying the wrong way without goodbyes,  
dead sure it's happening.

I once could lift off readily,  
the arms as oars.

A wall-high wave comes churning at us.  
Brother, you're walking toward it.

What takes up half a lifetime  
transpires in a fingersnap.

Now I lay me down, what next?  
bright sweetening, o please

out Sigmund Freud, who characterized dreams as wish fulfillment. But merely to let a dream happen is to invite the unpredictable and often the unsettling. What feelings, what preoccupations surface!

Artists realize that. Think of the surrealists. Think of Alfred Hitchcock or Joyce Carol Oates or Stephen King. Shakespeare, in his final plays, made capital of the dream world. His late romances—*Cymbeline*, *Pericles*, *The Winter's Tale*, *The Tempest*—tiptoe over cataclysmic events. A whole atmosphere of menace weighs upon them—calumny against chaste wives, threat of rape, incursion of pirates, shipwreck, lost loves, wits gone astray. Then, almost improbably, there is a recovery—innocence preserved, couples reunited, the dead found alive.

T. S. Eliot sums up the strange things Shakespeare does in the late romances: "He tends to transform the plot of this drama into a sort of fairy tale or fantastic romance and to simplify his characters in such a way that they become bearers of an emotional reality of which they, as acting personages, are not conscious themselves. In these later plays the palpable world turns into a dream-world, and the role which dream and vision play in them is deeply significant" (my translation, from "Shakespeare's *Verskunst*," *Der Monat*, May 1950).

*The Tempest*, the most familiar of these dramas, best illustrates the alternating rhythm of estrangement and reconciliation. Healing songs by the spirit Ariel counteract not only a drunken ditty by Caliban but also the deeper influence of evil. At the wedding ceremony of Miranda and Ferdinand, the deities Juno and Ceres sing an earthly benediction. But my favorite song of these plays, almost a lullaby, meant to sweeten the dreams of one who has died, comes in *Cymbeline*: "Fear no more the heat of the sun, / nor the furious winter's rages" (act 4, scene 2).

**D**ream, when you're feeling blue. Dream, that's the thing to do." So say those soothing lyrics from the Age of Optimism. Well, now. By *dream* one can mean "fantasize," as the song clearly does. That would bear



Two books have recently left me thinking about nightmare imagery and our almost ritual need for invocations to make things come out right (yes, I suppose this is wish fulfillment, in a justifiable sense). One is *The Century*, a chronicle of the past hundred years, by Peter Jennings and Todd Brewster (Doubleday). The authors intersperse their narrative with memorable photos and with testimonies from ordinary people who have lived through major events. Reading this tome, how often I have had to steel myself before the plunge into yet another chapter of our era's inhumanity and misery, its dictatorial ambitions and ideologies. Although blessedly preserved from battles, famine, or having to flee for my life, I too have had this imagery stamped upon me. Who hasn't? It can easily result in a pessimism about the possibilities of goodness, but it can also awaken in us some determination to make our planet come out better, be more a city of God.

The other text, also cataclysmic, is none other than the Book of Revelation, not so much my own choice for perusal and pondering as it is the church's. The daily Office of Readings presents the whole of Revelation from the Second Sunday of Easter through to the Sixth. Again, the church takes us through this same book via the lectionary for mass in the last two weeks of ordinary time, a period reminding us starkly of the end time. We just cannot escape those apocalyptic horsemen and beastly scourges, the stars being swept from heaven, and the spectacular fall of Babylon ("What is the city over the mountains / cracks and reforms and bursts in the violet air," T. S. Eliot asks in *The Waste Land*.) Taking these visions literally, one would find the enemies of God—that is, all the people hardened in sin—done away with several times over. Literal reading of Revelation has in fact lent itself to some bizarre forms of barely Christian religion.

Revelation originally had the purpose of confirming new Christians in their refusal of emperor worship and fortifying them against Roman persecutions—terrible pressures that no one can minimize. As to its genre, Revelation strikes me, on latest reading, as an extraordinary dream book, drawing heavily, as writing always will, on what the author has read. The author of Revelation pillages the Hebrew testament for end-time material—the plagues of Egypt, the pagan luxuries of Babylon, the marauding punishers of Israel described by Isaiah and Ezekiel, the triumph of the "son of man" and the ancient of days as seen by Daniel.

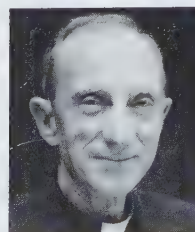
Reading the history of our own century profoundly saddens us. What enormous waste of life and undeserved suffering for civilians—indeed, for whole continents. Such unthinkable injustice, and such a puzzle about God's providence. Revelation takes the

vantage point of God's judgment and evens up accounts. It paints in black and white, sorting out believers from weaklings and unbelievers. We can hope that God's mercy will enfold much more of struggling humanity than this homiletic text, aimed against the powers of this world. Still, we have to acknowledge the brilliance of the intended highlights of this book: the victorious Savior on a white horse, the enthronement of the Lamb (depicted vividly by Jan Van Eyck), the woman clothed with the sun, "the great multitude which no man could number," and the celestial Jerusalem.

Marian Anderson once evoked this Jerusalem unforgettably, in her milestone concert in Washington, D.C., when she sang "O What a Beautiful City." The slaves who composed that song desperately needed the vision of that city. Georg Friedrich Handel too lodged something wonderful of Revelation in our heads, its celebratory hymns, when he brought *The Messiah* to a crescendo with "Worthy is the Lamb that was slain." No, the hallelujah chorus is not the peak of *The Messiah*.

Shakespeare's King Lear, the arch-sufferer, when overwhelmed with images of impurity and betrayal and a bit crazed, pleads with his chamberlain, the Earl of Gloucester, "Give me an ounce of civet, good apothecary, to sweeten my imagination." As a society and as individuals before God in a very mysterious and often troubling world, we do need our good dreams.

Therapists in our day will continue needing the evidence of uneasy dreams to learn what is troubling us. And cultural critics will have to display, in current theater and fiction, the preoccupation of our times with loneliness, excess, and recrimination. But all the more, the dreaming subject and the dreaming society need that good-night summoning of pleasant dreams, by which we mean an invocation of goodness, some blessing, and a vision of things gone right. We must lie down, and get up too, with that awareness of the Holy Ghost, as Gerard Manley Hopkins put it in his poem "God's Grandeur"—"brooding over the bent world with warm breast and with ah! bright wings."



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# Vocational Assessment

*Joanne Marie Greer, Ph.D.*

**C**andidates today reflect a wider age span, a greater variety of families of origin, and a wider range of cultures than a generation ago. This diversity increases problems in fitting into the group, whether in the novitiate or the seminary. How does a formation staff identify the kinds of problems they can easily address, as opposed to the kinds that are very difficult to handle? In order to contribute, how closely must a candidate fit in? How is it possible to assess the appropriateness of foreign candidates if cultural differences invalidate the usual psychological testing procedures? This article examines, from an object-relational perspective, these important questions about vocations in today's global church.

## **FITTING IN**

A children's book I enjoy is called *Alistair's Elephant*. Alistair is a little boy with set routines for sleeping, eating, studying, and taking recreation. He is a well-behaved child whose clothes are always neat and clean. He makes lists of his tasks each day. He always knows the answers in school and raises both hands.

Every Saturday Alistair goes to the zoo. One day an elephant follows Alistair home and proceeds to disturb Alistair's routine. The elephant is sloppy and intrusive; he peeks at the boy when he is dressing and eats all of Alistair's books. Finally, Alistair succeeds in bringing the elephant back to the zoo and thinks his

routine is safe again. But on the last page of the book, as Alistair leaves the zoo with a sigh of relief, we see that a giraffe is secretly following him home.

When I read this story, I am ambivalent. On one hand, I am on the elephant's side. Alistair is just too rigid; I think he needs a little shaking up. On the other hand, I do know that the elephant has to accommodate to Alistair's reality to some extent.

Getting rid of the elephant won't protect Alistair from change. The giraffe brings its own set of problems, different from the elephant's but just as bothersome. Neither the elephant nor the giraffe can fit into Alistair's lifestyle, but they may make his life more interesting. This story says to me that there may be value to those who do not fit in so easily.

A second story also comes to mind—the real story of a small, dying order of only 40 members, told to me by a colleague who troubleshoots with religious orders. He said the order's big problem was that it admitted only candidates exactly like the current members, who were blind to their own shortcomings. And those shortcomings—worldliness and lack of imagination about ministry—were slowly killing the order. This was true even though the order was financially secure because of its enterprises.

This points to a provocative question: To what extent does the candidate's maladaptation possibly point to a problem within the order or seminary rather than a problem within the candidate? Can the

maladapted candidate ever have a prophetic role to play vis-à-vis the membership of the order or the priests of the diocese? Should all maladapted candidates be rejected? How much should a candidate have to be “just like us”? Perhaps at least some candidates should bring something new to the group—something to shake things up a bit.

The formation team must make a sort of “job analysis” of the tasks of living and working in a specific diocese or order at this particular time in history. I emphasize the particular time in history because needs and tasks change over time. For example, most orders in North America must now care for large numbers of aging members. This task was not significant in the late 1800s because people did not live as long then as they do today. Each formation team must ask: What psychological traits are needed in abundance, in this group or geographical area, at this time in history? What traits are seldom needed? What traits would be a hindrance or a problem?

Another important question may come to mind after some months of working with a candidate: Could it be that this candidate’s traits indicate a religious vocation but not to this particular order, or not to the diocesan priesthood? Candidates usually knock on the doors they know about, and most candidates don’t know the full array of options. Furthermore, they may not know themselves well enough to know what they should seek for themselves. Formators must consider that their role may sometimes be to encourage a candidate to leave his or her chosen program and seek another.

## BEING NORMAL

How “normal” must the candidate be to succeed? We are all to some extent abnormal, in the sense that no one is at the norm—that is, at the mean average—on all psychological qualities. Someone who appears to be at the norm in every way may be rigidly defending against being different or being noticed.

In selecting trainees, psychoanalytic training institutes avoid what they call the pathologically normal candidate. It has been found that such a person is highly defended against insight into himself or herself and so is virtually untrainable. The effort to be average in every way is often chosen to defend oneself against both internal and external criticism. The person who is pathologically normal is not a risk taker and certainly not a visionary. To speak of the selection process in a quantitative way, we want to see some variability in the person, some flexibility, some capacity to change as the situation changes, some ability to imagine life being different than it is now. Otherwise, conformity to the formation process will be only external, not from the heart.

At the same time, it is important to pay special attention to strong deviations from the norm that are in themselves morally neutral and not sinful but that will hinder successful formation within a particular group. An obvious example: a young man who suffers from claustrophobia and has a high need for physical exercise would not fit well in a totally enclosed contemplative order that performs intellectual work. He may be extremely devout and willing to make significant sacrifices for the love of God. However, if he attempts a totally enclosed life, the order may later find itself with a mentally and physically ill member to care for. Perhaps all parties would be better off if he were referred to a contemplative order that performs vigorous agricultural labor for part of each day. In such a setting, his personal traits would not interfere with formation or have to be fought against.

Decades ago a psychological mismatch would have not seemed as problematic as we now know it is. Priests and religious, and the faithful as well, believed that God would give each person the strength needed to serve God well. But this attitude calls to mind a proverb from the American South: “God takes care of fools and babies.” By implication, the rest of us are supposed to have some common sense. Asking the impossible of oneself or of another is a waste of energy that could be put to more productive use. Granted, it is hard to turn away an attractive, willing candidate, but this may sometimes be the best outcome for all. For a group to seek the welfare of each applicant and of the church as a whole with a generous heart, the group must also have faith that God will send it appropriate candidates.

The candidate’s quirks or relative abnormalities could be potential problems, but in the right group the same quirks might also be potential opportunities. “If you have lemons, make lemonade”—in other words, turn what is sour in life, or in one’s character, to some advantage. The trick in making any successful vocational choice is to choose work that capitalizes on character traits we have in abundance and demands little of character traits we lack. The textbook illustration is the man with sadistic tendencies who is a successful and happy butcher in the marketplace. His work engages his destructive character traits and keeps him safe from acting them out in a dangerous way. Another example is the woman who needs and values regularity and silence and is good at keeping things in order. She might make an excellent librarian. In contrast, the woman who is stimulated by creative chaos is not suited for library work but might be happy as an educator of small children.

It is not a useful strategy to look for the person who is “well-rounded” or average in terms of personality and character traits. Instead, in selecting candidates



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## Outreach and education regarding priesthood and religious life should be targeted to those most likely to be good candidates

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for any type of training, it is best to look for people who are strong on character traits that facilitate the training and the work assignments that follow, and who are weak on character traits that interfere with the training or work. And, at least sometimes, it is worthwhile to look for the candidate who brings something fresh and new to the group.

Clearly, one must consider not only the applicant's needs but also the group's. Some of the traits needed to work well in a particular group will be specialized. For example, a group that does only seminary teaching cannot admit a person who is intellectually incapable of advanced studies or who holds scholarship in contempt. Each group has its own needs. But many traits of the desirable candidate are applicable across a variety of missions and charisms.

### TRAITS OF DESIRABLE CANDIDATES

It is obvious that the desirable candidate is, or has the potential to be, a psychologically healthy adult. Only if one is at peace within oneself can one have any energy for ministry. Furthermore, some general characteristics of all healthy adults will have much higher importance in religious life or priesthood. Let us look at some of the things we know about psychologically healthy adults.

**Capacity for Concern.** A healthy person is not totally self-centered; he or she can perceive the pain of others and be aroused to concern. In an interview, such an applicant would spontaneously speak in some way of the religious, physical, or mental needs of others as a factor in his or her call to religious life. The healthy applicant would not see a religious vo-

cation simply as "me and God" but also as a concrete way of showing concern for others.

The lack of a capacity for concern about others is a strong indicator of narcissistic personality disorder. The narcissistic person is cold and egotistical and enjoys power. His or her view of reality is severely impacted by any real or imagined injury to his or her self-esteem (narcissistic injury). The rage that follows is very hard for others to deal with. A narcissist believes his or her version to be the only possible truth and is capable of causing much pain.

The priesthood is attractive to narcissistic men because of the dramatic trappings of power: costumes, ceremony, formal deference. A formator at a seminary once told me of a narcissistic candidate for ordination who had already secretly ordered his custom-tailored bishop's costume. Narcissistic women often promote themselves into authority positions in a community, leaving the group wondering what hit them.

In some countries, the capacity for concern is limited by culture to extended family and friends. To be an appropriate candidate for priesthood or religious life, one must be capable of concern for the stranger. In the developing world, it may be particularly difficult for young men and women to relinquish close identification with their families and transfer their primary attachments to their companions in religion and those to whom they will minister.

**Capacity to Be Alone.** A young child is first able to play without the presence of the primary caregiver when the child can keep the caregiver in mind and know that he or she continues to exist, even if out of view. This is a major developmental attainment, yet many adults have never reached it. The deficit may be due to undependable caregivers, inborn impairment in the individual, or both.

A person who cannot endure solitude is batted about by group opinion and needs to be with others to feel alive. The capacity to be alone is important in religious life for a number of reasons: the need to separate from loved ones; the need to make oneself available for prayer; the need to observe communal rules to provide silence and a prayerful atmosphere for at least part of the day; and the occasional need to take unpopular positions on issues.

Some useful questions about a candidate might be: Has he or she shown a capacity for independent, solitary activities such as pleasure reading or solo sports? (To get the answer, one might ask how the person likes to use leisure time, or inquire about his or her hobbies). What are the candidate's regular prayer practices? (An interest in meditation would be

a good sign, but no applicant is likely to answer negatively any questions regarding prayer.)

It is a good indicator of the capacity to be alone if the individual has actually chosen to live alone for a period of time, so one might inquire about living arrangements if the applicant is old enough to have had some choice in the matter. It is important to note that the relevance of this issue for women depends on whether their culture of origin condones their leaving the parental household in young adulthood.

### **Capacity to Be a Contributing Member of a Group.**

The desirable candidate, being well socialized, realizes that the welfare of the group is also his or her welfare and that out of fairness he or she should help out or take a turn. Incapacity to perceive group needs when those needs are in conflict with one's own is another indicator of narcissistic personality disorder. A proverb the Sisters of Saint Joseph taught me in high school is apropos: "My right to swing my arm ends where the other person's nose begins."

In the United States, formation directors used to be in the habit of labeling failure to join in group activities so negatively that candidates conformed out of fear of disapproval. This strategy deprived the formator of information about the candidates' awareness of reality and bond to the group.

The native culture of an applicant must be taken into account in evaluating the applicant's capacity to be a contributing member of a group. An applicant from the United States who is highly group-oriented is to some extent going against his culture, which emphasizes individualism, whereas an Asian candidate with the same attitudes may be conforming to the dominant expectations of his culture.

But we are not so much interested in group membership per se as in the emotional capacity to "contribute in"—that is, to be emotionally concerned for the welfare of the group, to feel responsible, and to want to do one's part for the welfare of the whole. For an Asian candidate, it might be a relative strength to oppose the group occasionally—to be able to separate what the group wants from what might be good for the group and, at times, to go against the group's wishes.

**History of Stable Relationships.** In interviewing, one asks about friendships and also about contacts with relatives. Again, one must evaluate the individual within the context of cultural differences, even within the United States. For example, an Anglo-American who usually telephones siblings and parents once a week is considered well-connected within the family, whereas the typical Hispanic-American would have a number of telephone contacts with family in the course of a week.

An Anglo-American is more likely than an Asian to have long-term friendships outside the extended family. But while it would be a rather negative mental health sign if an Anglo-American had never had any close emotional ties outside the extended family, it would be less of a negative in a Hispanic or Asian individual. (A systematic way to inquire is to ask the candidate to talk about friends from elementary school and high school, and whether any contact is maintained in adulthood.) Also, Anglo-Americans tend to be low-key in relationships; contacts with friends may be relatively infrequent and superficial. A level of psychological intimacy that would be normal between two Hispanic women might be an indicator of pathological dependency in Anglo-American women.

A negative indicator is a history of many school or work changes, suggesting an inability to get along with teachers, supervisors, or companions. For younger applicants with no work history, useful questions are: Who is your best friend and how long have you known him or her? Who was your best friend before him? And before that friend? Have you ever had a steady girlfriend (boyfriend)?

**Capacity for Empathy.** The priest or religious who will serve others or hold authority over others has a special need for empathy—the ability to put oneself in another person's shoes and imagine what his or her feelings and reactions would be in a given situation. Empathy must be distinguished from emotional flooding. That is, the empathic person is not swept away by vicarious experience of the other's emotion. There always remains an intellectual perspective, a clear awareness that the emotion belongs to the other person, not to oneself. Denial of the existence of evil, hatred, and suffering in the world is obviously unacceptable in a candidate. But at the other end of the continuum, being overwhelmed by emotional responses to suffering is not useful either.

Empathy might be evaluated by questions such as the following: What was your reaction to some local disaster? What did you think about the disgrace of some local politician? What are your thoughts when you see a crippled person? What do you think about the situation of girls whose parents arrange their marriages? The choice of questions would be influenced by the applicant's culture, but the responses should indicate some ability to acknowledge the other's distress rather than deny its existence and to formulate the content of the distress in some detail.

Once the candidate is admitted, formators should be careful to avoid indicating what specific empathic responses or behaviors they want to see. The candidate's spontaneous empathic response to small daily



situations with others is most informative. The person who lacks empathy often reveals himself or herself to be self-centered in an undesirable way.

Individuals with schizoid traits are so poorly in touch with their companions that they do not grasp others' needs for assistance or companionship. They fail to join in tasks or to help others because they don't perceive what is going on around them as having anything to do with them. Traditional religious orders, with their elaborate rules for relationships and relatively long periods of silence, are attractive to the schizoid person, who fears and avoids close human contact. Schizoid individuals may appear to be prayerful yet may simply be withdrawn.

### **Capacity for Sublimation, Especially in Sexuality.**

By sublimation we mean redirecting any bodily drive to an end less purely "animal" and more reflectively human. For example, sublimation of eating could consist of directing one's eating away from a primary emphasis on the pleasure of taste and toward an emphasis on eating lower on the food chain, to cause less environmental impact and to leave more for the poor. In the sublimation of sexuality, one's sexual drive is directed away from emphasis on sexual pleasure and toward loving and valuing others for their own sake, not as pleasure objects.

Sexuality has a developmental continuum, beginning with the toddler's delight in the discovery of pleasure zones and ending in what psychoanalysts call genital sexuality. A strong distinction is made between phallic sexuality, in which the emphasis is on self-pleasure and the other is treated as a means to an end, and genital sexuality, in which the emphasis is on mutuality and the other is respected as a person. Only if a person has attained genital sexuality can he or she successfully sublimate the sexual drive.

Any assessment should include an inquiry into both the applicant's sexual history and his thoughts about sexuality. The purpose is to find out whether the applicant's understanding of sexuality is relational and interpersonal rather than isolated or exploitative of others. It is not so important whether the applicant has been sexually active or not. What is important is that sexuality has been firmly linked to affection and concern for a person who is regarded as an equal. An individual who has attained this level of psychosexual development is unlikely to settle for anything less in the future. He will either remain abstinent or leave the vowed life, but he is unlikely to become a narcissistic sexual exploiter of those weaker than himself. Some of these ideas are distinctly Western and culture-bound, so that evaluation of Third World candidates may be quite difficult. For example, in some cultures it is incomprehensible to men that

a female sexual partner might be seen as an equal. However, there will be other cultural norms for a caring relationship.

Evaluation is easier with a more mature applicant because there is more life history. In some cultures, it is important to find out whether sheltered young women actually understand the sexual act and the begetting of children, and whether they actually know what they will be sacrificing by a vow of celibacy.

If a young applicant has not been sexually involved or has never experienced deep emotional involvement, his or her behavior in other relationships may be predictive of how the vow of celibacy will be observed. Is the applicant capable of making sacrifices for the welfare of another? Can the applicant inhibit strong emotional expressions that distress others and show feelings appropriately? Is the applicant fair and kind to siblings or schoolmates? Does the applicant show concern when his or her actions distress another? Does the applicant generally show a (culture-specific) sense of boundaries and limits regarding the needs, feelings, and possessions of others?

**Capacity for Symbolization.** This capacity makes it possible to manipulate data in one's head rather than with one's hands, to be verbal, and to work with problems verbally rather than physically. The capacity for symbolization is related to the capacity to be alone. A child can tolerate mother's physical absence only if he can imagine her in his mind and know that she still exists for him; this is the first symbolic process.

The capacity for symbolization is an important indicator of a candidate's fitness. Literal-mindedness is not a useful trait in a priest or religious. So many of the life satisfactions of a priest or religious are dependent on symbolic meaning. Roman Catholic liturgy is heavily ritualized and symbolic. Catholic theology frequently uses a symbolic vocabulary. The sublimations and sacrifices involved in the vows gain personal meaning and are softened through a capacity for symbolic manipulation and substitution. For instance, the capacity to view oneself as a spiritual parent to needy children gives psychological meaning to the sacrifice of physical parenthood.

The capacity for symbolization is formally evaluated through one-on-one psychological tests. In an informal evaluation, one might ask an applicant to explain the meaning of some bits of unfamiliar poetry or some common proverbs. One might ask why water is a good choice to use in baptism, using the symbolism in the sacrament to evaluate the person's capacity to think symbolically.

In Westerners, literal responses to certain questions (e.g., regarding the meaning of well-known proverbs) are a marker for schizophrenia-like ill-

nesses. In persons of other cultures, such answers may be appropriate. Of course, literal answers can come from a Western interviewee who is simply frightened, in which case a formal psychological evaluation should be made.

**Modulation of Affect.** A healthy individual's feelings are usually not so intense as to sweep him or her away or to cause intense external displays such as loud shouting or weeping, or physical symptoms such as fainting. Clearly, the capacity to modulate feelings is also an important underpinning for the vow of celibacy. Unbearably intense feelings are characteristic of young children and of people with certain types of mental illness. Again, we must take careful note of cultural differences. Displays of feeling that are normal in Hispanics and Africans could be indicators of pathology in Anglos or Asians.

Some Asian cultures strongly emphasize keeping feelings private. It would be necessary to assess whether someone from such a private culture is sufficiently in contact with inner feelings and able to express them when necessary. This characteristic is difficult to assess in an interview. Often, one can judge only by actually living with the candidate for a while. However, one might ask the interviewee to talk about a time when he or she was frightened and a time when he or she was very sad. Signs of problems would be an inability to recall such feelings or talk about them—or, conversely, an excessively emotional response to the question.

**Capacity for Regression and Reconsolidation.** By regression we mean slipping back to functioning at an earlier developmental level. By reconsolidation we mean the capacity to easily return from a regressive movement or episode to one's higher level of psychological functioning. Regression is a normal self-protective response, necessary for play and for creative work, such as writing and expression through the various other arts.

The seesaw process of regression and reconsolidation indicates a flexibility of personality that is protective of psychic well-being. Regression is necessary for play, and play is necessary to relieve the strains of daily living. However, one must also be able to leave one's recreation and return to the business of living. Temporary regression also can be a way of protecting oneself from unbearable pain or fear, so that one does not go mad. Contemplation is in a sense regressive, since the contemplative temporarily abdicates conscious control of the psyche.

Evaluation of this capacity focuses on play. We would hope that the typical younger applicant would not yet have experienced unbearable pain or fear,

and he or she is unlikely to be a contemplative at this time. One might ask such questions as: What do you do to relax? What are your hobbies? Do you like the theater? How do you experience it? What do you like to read? How do you recoup from a period of overwork, such as final examinations week?

Within the community of novitiate or seminary, this strength would be shown by a capacity to participate without awkwardness in irregularly scheduled treats and pleasurable activities, such as special celebrations, meals, or vacations, and then to return to the quiet adult routine at the appropriate time. The candidate who feels threatened by such experiences may often try to escape them by volunteering to carry out some necessary task away from the group, or may claim to need the time to study or to catch up with prayers instead. Such an individual is often perceived as a goody-goody or stick-in-the-mud by other candidates. Conversely, the candidate who regresses easily but has difficulty reconsolidating will be slow to switch back over from the relaxing activity to the normal routine.

Old-fashioned, enclosed novitiates can induce significant psychological regression in people because of the sudden sensory and social deprivation they impose. What the candidate regresses to is a childhood state of dependency and self-preoccupation, which may include a bodily preoccupation with eating and elimination. These phenomena are some of the reasons this type of formation is less common now than in the past. However, if the candidate is exposed to such an experience, it is important for formators to be attentive to the regressive process and to titrate it. A well-qualified candidate with a good sense of self-preservation may leave abruptly; a more fragile candidate might experience a breakdown. Candidates in the regressive mind-state are vulnerable to bullying, humiliation, and exploitation by those senior to them.

## OTHER ASPECTS OF ASSESSMENT

**The Applicant Pool.** In some countries, such as the Philippines, the church is receiving large numbers of applications for priesthood and religious life—yet assessment of the applicants may yield only a small number of highly qualified candidates. Outreach and education regarding priesthood and religious life should be targeted to those most likely to be good candidates. This statement is simply a generalization about what you might call “marketing strategy”; its application would, of course, differ from country to country. I will offer two brief illustrations of the vagaries of applicant pools in different countries.



In the United States, traditional, conservative religious orders are receiving more applications than liberal religious orders. The deterioration of the nuclear family, the increase in the number of mothers working outside the home, and the growth of social tolerance for disordered conduct has left many American Catholic children without effective parents. These young people tend to be attracted to traditional religious orders, whose familylike social structures offer firm leadership, mutual social support, and structured communal life. But these emotionally deprived candidates place heavy personnel and financial strains on the formation process. Many of these candidates must be placed in intensive psychotherapy concurrent with their religious formation. They are much more psychologically impaired than the typical neurotic young adult, largely because they lack the core sense of self that comes from consistent, empathic care throughout childhood.

Obviously, the traditional religious orders in the United States must try to attract more candidates who are psychologically sound and fewer who need extensive psychological care to prepare them for formation. It might be a service to the church and to humanity to provide a caring home to these wounded young people, but the selection process must emphasize the continual restaffing of the work of the order. A religious order is not a hospital, and dysfunctional candidates will not be compliant for long. Once they have been sufficiently nurtured to feel safe within the order, these candidates will give their superiors the burden of parenting them through a long and rebellious adolescent phase. Paradoxically, the good care given to such a candidate may actually destroy their superficial suitability for religious life.

Now let us look at the Third World countries, where there are special problems in discerning vocations. In countries with large social-class differences and a very small middle class, the seminary or religious order has been a potential pathway to upward social mobility for poor youth. An Anglican priest of my acquaintance calls this "rice Christianity"—that is, devotion to Christ in order to improve one's standard of living. Some such ambivalently committed candidates will remain in priesthood or religious life, perhaps serving the church poorly or even creating scandal by their behavior. This was sometimes the case earlier in this century, when Irish bishops sent young priests and nuns, recruited from deprived and traumatic backgrounds, into the American South as missionaries.

Other such candidates with mixed motives, once they are educated, will return to secular pursuits in their native countries, in a higher social class than they

previously could have occupied. Although this is a better outcome, it is not the purpose of a formation program. It may be a service to the church and to humanity to create future lay Catholic leaders, but this is not the mission of the seminary or the novitiate. Instead, the church should purposefully use scholarships to Catholic universities to develop lay leadership.

In the developing world, formators should try to discern the candidate's depth of commitment to the priesthood or religious life. A vocation should be a free choice. When a candidate's motives seem confused or immature, it is best to help him or her make arrangements to get higher education first and then reconsider the call to religious life.

Another way to solve this problem might be for dioceses and orders, as part of their outreach to young people, to work toward providing higher educational facilities—not just vocations—for all Catholic youth in the developing world. The religious community's true spirit of generosity and service to all youth will surely be repaid by the gift of sufficient authentic vocations from among the students. And these authentic vocations can be better nurtured within a group of similarly motivated companions. In this way, the novitiate or seminary community will be undiluted by weakly committed candidates who are simply desperate to escape poverty.

I am not saying that all candidates from poor families in poor countries are ambivalently motivated or that many of them will not make good priests or religious. And my proposed solution of higher education for all is, admittedly, a bit idealistic and would take time to implement. But vocational outreach efforts in developing countries should especially target Catholic youth who can make a truly free choice of service to the church because they have other opportunities for higher education and social mobility. In this way, a significant burden will be removed from the formator's work, and a better environment can be maintained for serious candidates.

### **The Mutual Enculturation Process in Formation.**

The Catholic church is a universal church, not a Western church. Yet until recently, most of the financial resources of the church have come from the West. Much of the theological heritage of the church has been written in Western languages by Westerners. Yet now the majority of vocations are not from the West but from the developing world. Many seminary and formation programs in the developing world are still designed by and perhaps partially staffed by Westerners. The non-Western candidate is, in effect, being inculturated into the culture of the professional servants of the church—a culture that is still predominantly "Roman" and Western. But the process

must not and will not be a one-way street; inevitably, the Westerners will also be inculturated.

An American formator in a European religious order, working with female African candidates, told me a funny but perplexing story about the tendency of the candidates to supply their extended families with food staples from the novitiate kitchen. This depleted the novitiate of supplies and made it impossible for the European motherhouse to estimate the costs of running the novitiate in Africa. The candidates could not comprehend why the formators did not want them to do this. They felt that their actions were not only correct according to the tribe but correct according to the gospel as well.

The formator felt that the candidates had made her rethink her view on her order's lifestyle when operating in Africa. At the same time, she saw no easy solution. She had a set budget. She was training the African sisters to fit into a transnational group, and to her that meant they needed to learn to live a certain way. Her candidates had presented her with a dilemma about her order's understanding of the gospel. This sort of exchange is a mutual inculturation that will ultimately enrich the church, but a lot of practical dilemmas must be faced along the way.

Cultural differences can discourage a foreign-born candidate by making him or her feel a lonely misfit. Candidates who will be an ethnic minority in the formation program should be given special help. To a lesser extent, this also applies to adult-convert candidates who are being trained amid a majority of "cradle Catholics." Lack of attention to these issues can lead to the loss of desirable candidates.

## RECOMMENDED READING

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# The Priest-to-Bishop Relationship

*An Interview with Reverend Roger A. Statnick, Ph.D.*

**T**his interview with Reverend Roger Statnick, Ph.D., of the Diocese of Greensburg, Pennsylvania, explores the complex relationship of bishop and diocesan priest in the postconciliar church.

The interview's focus is on the diocesan priest. The ministry of a religious priest in general is not addressed in any detail.

**HUMAN DEVELOPMENT:** Thank you, Father Statnick, for agreeing to this interview. Please tell us about yourself and your diocese.

**Roger Statnick:** My seminary studies began at Saint Vincent's in Latrobe, Pennsylvania. My theological studies were at Saint Mary's Seminary and University in Baltimore, Maryland. I was ordained in 1973 and, as a member of the Sulpician Society, began initial formation work in a college seminary, Saint Patrick's, in Mountain View, California. After four years I began both graduate and post-graduate work at the University of Notre Dame. I hold S.T.M., S.T.L., M.A., and Ph.D. degrees in systematic theology.

The diocese is medium in size, relative to others in the United States. It comprises four counties, with approximately a quarter million Catholics. The local economy has been built predominantly on blue-collar industry and rural farming. Currently, the diocese is experiencing a shift from the lifestyle shaped by the economic base to a more mobile and technological middle-class lifestyle. After a significant decline, the population has become more stable but is aging. Family and community roots are

deep, providing strong motivation for people to remain in the area.

**HD:** What were you doing when you were involved in seminarian and clergy formation?

**RS:** My thirteen years in formation ministry involved undergraduate and graduate seminary teaching and spiritual direction. I was also involved in administration and teaching in the continuing formation of priests. I did this formation work in a formal doctor of ministry program, as well as in workshops and retreats. It gave me the opportunity to reflect on the development and transitions that occur during a priest's life, both personally and systemically.

**HD:** The second half of your life since ordination has been spent as the vicar general and the moderator of the curia for the diocese of Greensburg, Pennsylvania. What exactly is the role of a vicar general?

**RS:** As the vicar general, I extend the role of the bishop as it is delegated to me. To do this well, I must know the mind of the man and his vision for the local church, as well as how he makes pastoral judgments in the everyday life of the local church.

There is no manual to prepare one to be a vicar general. One learns on the job, working closely with the bishop, sharing and shaping a vision with him. Above all, the job demands understanding of and respect for the bishop's ordained role.

My role as moderator of the curia is basically a managerial one. The moderator is the chief operations

officer within the diocesan administration. Basically, I make sure that projects are completed, resources are allocated according to priorities, and personnel issues are addressed. I help the various diocesan departments collaborate to advance the church's mission.

**HD:** A vicar general deals with many issues involving priests. Is it this experience that led you to continue to study the question of the role and identity of the diocesan priest?

**RS:** I was always interested in the role and identity of the diocesan priest, even as I studied for the priesthood. My reflections also come out of the exploration of the universal call to holiness and the role of the laity. As we become clearer about their place in church and society, we simultaneously become clearer about the role of the ordained priest. As the Holy Father, John Paul II, says in *Pastores Dabo Vobis* on the formation of priests, "The more the laity's own sense of vocation is deepened, the more what is proper to the priest stands out."

The nature of our identity as priests and our connection to a bishop is always before us. Just visit any priests' gathering; within a very short period of time, conversation often shifts to the bishop. We priests respond viscerally to this relationship. It is different from the way businesspeople react to the boss. I suspect that it is also somewhat different from the way religious in active congregations react to their major superiors. But a religious priest ministering within the diocesan structure, especially as a pastor, must have an understanding about his relationship with the diocesan bishop. In such an assignment, the religious is assuming a role in the local church and therefore exercises his ministry within the direction and vision of the diocesan bishop. He must respect the fact that the bishop is the head of the local church, and in that way the *communio* is served.

The "exemption privilege" of the religious is not a warrant to release them from the "ordering" of the local church by the diocesan bishop. Rather, it frees the religious to minister in other venues not directly tied to a diocese. In this way, the Spirit advances the *communio* in more universal and less formally ecclesiological dimensions.

**HD:** Are you saying that the relationship between bishop and diocesan priest is delicate?

**RS:** Yes. The nature of this relationship can be understood only in light of the meaning of ordination. It is based in a theological reality. Bishops have different personalities, philosophies, and theologies. We

are often tempted to reduce the relationship with the bishop to terms of liking or not liking the man in the role. But this is not a substantial enough level of connection. There is a fundamental role shared by all diocesan bishops. Then there is the role the diocesan bishop shares with both the presbyterate and the laity, each in their respective vocations; this is about the bishop's ordination and his unique relationship with every member of the local church. His role is to oversee the *communio*, the people formed in and by the Spirit. They are to relate to each other and to the world as God does in the mystery of the trinitarian union. That is a profound relationship—the most profound possible in our faith.

**HD:** Is this relationship connected to the issue of clergy morale?

**RS:** Yes and no. I see the issue of morale in clergy as complex. When morale is high, it is a nonissue. Only when something is askew does the issue of morale surface. We also need to differentiate between morale within an individual and morale as a systemic issue as in a presbyterate. I see poor morale as the natural response to the major cultural shifts in the role and identity of the priest. There is also a dimension of morale involved in the bishop/priest relationship.

As I said, there is a unique theological relationship of priest to bishop. If we do not understand this theological connection established through ordination, then the priest's life and ministry is set upon a fickle and arbitrary foundation, like a personal relationship with the boss. This personal relationship could be affected by ethnicity, likes and dislikes, friendship, or other human dynamics. These will always be at play, but they cannot be primary in what binds the priest to the bishop. If that is all there is, morale will be a serious issue.

As a priest, I should not need the bishop to like me or be my friend in order to be happy in my priesthood. But I do need him to include me in the church mission he leads. At the same time, I must be willing to share in his vision and the mission according to the direction he sets. Poor morale can often come about through the actions of mavericks with their own causes—"lone rangers" who go their separate ways, often with parishioners they have seduced into following them. The presbyterate usually experiences lowered morale as a result.

History has not served us well in the bishop/priest relationship, and the fault must be borne by both parties. In the past, some bishops set up expectations or interfered in the personal lives of priests, in terms of matters of taste or legitimate leisure pursuits. There was an attitude of "Meet these terms,



please me, and I will either take care of you or reward you." Such dynamics do not foster a connection based on sharing in the mission of the church.

**HD:** In seminary ministry, you were involved in initial formation as well as the continuing formation of diocesan clergy. How does that experience contribute to your insights?

**RS:** I was involved in both initial formation and the formation of seasoned priests who returned to receive the Master's of Divinity degree. I learned that initial formation is the place to grasp the theory upon which one draws later in one's pastoral life. It is also the place to learn the theological and pastoral tools to be used in ministry.

During seminary, a pastoral ministry experience is only a practicum. Learning is compartmentalized—and, I might add, I do not think it can be done any other way. The candidate's plate is full. Then the man is ordained, and ministry, not compartmentalized study, becomes his full-time life. Having the right answers is now replaced by the need to minister, wherein the "right" answer has to be disclosed by engaging the situation, using the pastoral and theological tools one learned in the seminary.

**HD:** Quite a shift.

**RS:** Yes, but there is a temptation to try to keep life in compartments. Depending on the man's comfort level, he may emphasize time for himself over pastoral needs, or he may neglect study and reflection in favor of pastoral activity. The priest of the past was expected to be a man with all the answers. Priesthood was a ritualized way of being in the church and in society. Ritual, however, does not convert. It may fascinate, but it does not move people to conversion. Conversion is far more complex and involves engagement.

We have learned today that answers to pastoral situations cannot be predetermined. The priest no longer has all the immediate answers to people's concerns. This realization contributes to morale, since the pastoral issues and concerns of the people of God can be overwhelming.

Therefore, a convergence in the priest must occur. Everything that one has learned must be filtered in light of pastoral experience. Scripture and tradition, the teachings of the church, are tools to address the situation and discover the Catholic, Christian meaning and direction. In such a context, the feelings of the priest can be complex. He must constantly reflect upon himself and the ministerial environment to which he is assigned so as to come to true and relevant pastoral judgment.

**HD:** What is pastoral judgment?

**RS:** It is a learned way of living. It is a habit, or virtue, by which the priest continuously reflects upon the experiences of ministry and upon his feelings, thoughts, and actions in those experiences; reflects upon these in light of tradition; utilizes theological tools; and commits himself to the action required.

The action required is based on these questions: Is this action of God (or not)? Will it build the communion of God's people (or not)? Will it create relationships in the communion that are of faith, mission-focused, and constructive for the reign of God (or not)?

In my personal experience as vicar general, and in my years in the seminary, especially with the seasoned men, this is the most critical virtue needed today in the life of the priest.

**HD:** Is pastoral judgment part of the spirituality of the diocesan priest?

**RS:** Today much is written about the spirituality of the diocesan priest. This is helpful, as it differentiates us from priests in religious life. Our pastoral experiences are deeply connected to our being placed in a local church that has a relationship with a diocesan bishop and a local people of God. Our spirituality must be deeply rooted in a concrete sense of church. We must have a sense that our individual piety, rituals, and prayers are always in the service of the church. I may have great devotion to a particular saint, but that devotion cannot replace that which the church celebrates in a given liturgical time. The priest who would impose his private devotions upon a community, over and against the life of the church, has a spirituality that will not be helpful to the building of the local church.

The diocesan priest, as well as the bishop, is holy to the degree he is involved in ministry, seeks to enhance the communion, and prays constantly to make faith-filled pastoral judgments. His holiness is not so much about the amount of prayers he says as it is about how he prays and reflects in the midst of the pastoral life of the people of God. It is there that he is called to be holy.

**HD:** What is at the heart of the identity of the diocesan priest?

**RS:** Let me begin by saying that one cannot speak of the identity of the diocesan priest separately from the identity of the diocesan bishop and the local church. A person is marked in ordination, not for privilege but for a network of relationships. These relationships place the priest *in persona Christi* and *in per-*

*sona ecclesiae*. Simply put, the ordained priest stands within the community as a member of the church. He has been initiated into the church through Baptism, Confirmation, and Eucharist, as all the faithful have been. At the same time, through ordination, he stands in front of the community as minister of, to, and for the church. *Communio* is the word for this web of relationships between priest, people, and the bishop.

The priest's identity is deeply connected to the community. He is distinguished among the members of the community by how he is connected to them. His identity is about how he stands *in* the community, not apart from it. It is about what he represents to the community in his unique role as the ordained. And it is about what and how he contributes to the community. It is not about being special or distinguished for privilege. Sacramental character is not a personal claim by the one so marked. It is a particular responsibility of the ordained minister's relationship to Christ and to the community.

**HD:** The Western world would find it difficult to view the priest as not standing apart.

**RS:** I would agree. In Western culture, one is taught to gain self-worth by standing out, being an individual. Indeed, models of education as well as therapy emphasize the person's gaining self-actualization. The "self-made man" is unique, singular. There is an emphasis on psychological health and healing the individual. This is not sufficient and can create a distortion in the religious or spiritual context.

Major figures in our tradition, both in the Hebrew Bible and the New Testament, stand out not because they were loners but because of how they were in relationship to the community. The Exodus story is not about Moses; it is about how the leader Moses functions in the midst of the fragile, frightened community. It is about what he contributes to the group and, because of his presence, how the community develops and fails or succeeds along with him.

**HD:** And in the New Testament?

**RS:** Jesus is the central figure. Jesus' life and ministry is about adjusting relationships. He is about re-ordering life at every level—personal, social, economic, political, and religious. Relationships are re-ordered in light of his vision of community as *comunio*, the Kingdom of God. Through the Paschal Mystery, the Spirit has been given to us to continue the reordering of relationships.

In the person of Christ (*in persona Christi*), the priest therefore is uniquely involved in the ordering of right relationships. Like Christ, he performs this

role in relationship to his vision of the community and the reign of God. The priest is on mission; this is not passive or private engagement in ministry but an active communal engagement with and under God. The priest's identity is about being chosen for service of the Kingdom, of the world. The priest is in the person of the church (*in persona ecclesiae*).

**HD:** We have touched on the priest's need to be engaged in pastoral judgment, his identity, and his role in the ordering of right relationships. Are these connected?

**RS:** Yes, since the sacramental character of priesthood must be understood in terms of its relationship to others, not as a symbol of power, status, or significance. To be in the midst of the community as well as in front of it demands ongoing pastoral judgment. The priest stands as a prism to the community, reflecting back various aspects of their life and truth. He serves the people, but not at their whim. It is an interactive dynamic: he listens, responds, challenges, supports. He and the community experience mutuality in growth, holiness, and significance. He is there not to please people but to order the gifts in view of the mission. As priest, he is positioned and designated to do this. This is part of the "ordering" of the sacrament of ordination.

**HD:** "Ordered" by the bishop?

**RS:** Yes. The diocesan bishop shares the ordering of the charisms with the ordained. The identity of the priest takes shape in the unique relationship he has with a bishop of the local church.

**HD:** What is the bishop's identity?

**RS:** I am in the process of deeper reflection on this, in light of the church's documents as well as tradition. Today we speak of the ordination of the bishop, not his consecration. These words reflect major shifts in our thinking. In the past, the role of the bishop was believed to be that of "super priest." The theology of the episcopate was primarily that of priesthood. The distinction between priest and bishop was drawn not so much on theological grounds as on formal institutional authority.

The role of the bishop was viewed primarily as one of jurisdiction and power over. After the call to renewal of Vatican II, we speak of the role of the bishop as "ordained" or "ordered." He is marked to order the charisms of the local church. He is ordained into a collegium of other bishops, and he is to oversee the church in a local situation or diocese. Like Christ, he too is about creating right relationships.



The diocesan bishop is to reorder the charisms and relationships of the local church to reflect Christ, whose body is the church. He does this by calling forth the charisms (God-given gifts); coordinating the charisms for the good of the whole and for the sake of the mission; and assuring unity among the charisms, not competition.

First and foremost, the bishop is *in persona Christi* and *in persona ecclesiae*. He shares the responsibility for the ordering of the charisms with the priest.

**HD:** Yet it seems that we continue to view the role of the bishop as one of power over, or jurisdiction.

**RS:** Yes. We are caught in major cultural shifts. Nowhere is this more evident than in the case of clergy assignments. It is usually here that the worst of the system is visible. Priests often experience assignments as power over them, not as a way of ordering the charisms for the good of the whole. Changes become the ground for win/lose, you are in charge/I am subservient, or—worst-case scenario—a manipulation of the people against the bishop.

We are caught between this and the need for the bishop to serve the *communio* of the entire local church through clergy assignments. There is still the tendency for the priest to become threatened by assignments and to be individualistic, self-absorbed, and self-interested when the time comes for changes.

Clergy changes can create opportunities for all parties involved to strengthen the *communio* they have with each other—to ask questions about the mission, the charisms needed, and how everyone can work together. Most of all, such changes present an opportunity to put forward the various pastoral judgments regarding what is needed and how the *communio* will or will not be served by the changes. Mistakes can be expected. But all of this is to be tested and, finally, either accepted or rejected by the diocesan bishop, who is responsible for the order of the local church. Respect for his final decision is crucial, for the *communio* of the church is at stake.

**HD:** What is the place of the presbyterate in this conversation?

**RS:** When a man is ordained, he becomes a member of a group of priests serving a local church. That group is called a presbyterate. It is a theological reality in that, by virtue of ordination, these men share in the bishop's role to order the charisms of the local church. It is more than a group of buddies or classmates. All these men share in ordination and, as a group, share in the bishop's concern for the whole local church. They therefore must work together as well as with the

bishop. You cannot separate a presbyterate from the bishop; its purpose takes shape from their relationship. If a priest separates himself from a bishop—physically, emotionally, psychologically, spiritually—he cuts off his very lifeline to the church and to Christ.

**HD:** That sounds very serious.

**RS:** Indeed, it is. The primary identity of the priest is to stand *in persona Christi* and *in persona ecclesiae*. The linkage, in the Spirit, is through the diocesan bishop. This is not a management model in which the bishop serves as chief executive officer.

The priest ministers with and under the bishop. This is a theological concept, not a methodology. An example of methodology is collaboration, consultation. Those characterize how the bishop operates but not what is at the heart of the relationship.

Nor is a presbyterate a “fraternity” of priests, as it is commonly understood. By its nature, a fraternity exists to be of support to the members, whether socially, spiritually, or by virtue of shared interests. The presbyterate exists for an entirely different reason. Together, all the diocesan priests in the presbyterate share in the responsibility for the local church—and they share in it with the diocesan bishop.

The relationships these men foster with each other are not ends unto themselves. They are to be the means for advancing the mission. Care and support of each other, cooperation, and collaboration are needed to carry out their leadership role in the church, under the diocesan bishop. The presbyterate exists for the sake of the church, not for itself.

Destructive behavior and speech, malicious gossip, ambitious deceptions, pedophilia, and financial and sexual scandals all take energy from the mission and consequently tear at the relationships created in service to that mission. This leads to morale at its worst, experienced systemically.

**HD:** Is what you are describing a movement from a managerial, human model to a theological one?

**RS:** Something like that. The church's strong suit is her ability to reflect and act theologically. I think we have forgotten that all the other sciences can be of service to this great gift, but they cannot replace it. In some ways we have allowed other sciences to dictate our response. An example is how we view the presbyterate and its importance. In a managerial model, an executive is treated to perks and deference. A presbyterate is viewed as a gathering of the important people.

A church model looks at the gathering of the presbyterate as the place for reflection with the bishop on the mission of the local church. It is not a gathering

of the whole church and cannot be a substitute for such. A presbyterate does not gather as a social grouping for the sake of the members alone.

**HD:** In your role as a diocesan priest, what tensions do you experience?

**RS:** First, we do not have a common understanding of the role of the bishop as the person responsible for ordering the charisms versus the role of the bishop as juridical person. Second, many priests continue to see themselves as isolated individuals, concerned only about “my” parish and “my” needs; they lack the understanding of self as connected to a presbyterate concerned for the whole. Third, there remains the question of the individual rights of the priest, especially in the parish, versus the role and authority of the bishop. Finally, a presbyterate, in our tradition, is a gathering of men. Culturally, in America, men tend to relate to others in terms of power, competition, and control. Left unchecked, these dynamics can cloud the pastoral judgments we make, both individually and as a presbyterate. Inordinate concerns over who is closest to the bishop, who has his ear, who is in the power bloc are all symptoms of the negative dynamics of power and control.

Whether we like to admit this or not, the relationship of priest to diocesan bishop must change. We can no longer afford to base it on personality or whether the bishop is likeable or not. Nor can it be simply a matter of jurisdiction or formal power. The priest must connect to the bishop in his “office,” his ordained charism. It is that relationship which is our source for the ordering of charisms, wherever we minister as the ordained. This does not mean that we will have no differences. It is the putting forth of the differences that gives dimension to our understanding of this unique role.

**HD:** So, to summarize, you are saying that: the identity of the diocesan priest cannot be isolated from a relationship with the diocesan bishop; the identity is also connected to the people of God in the local church and cannot be separate from them; the role of the priest is to be a member of the church, to stand in its midst, as well as to stand in front of it as servant-leader under the bishop; the pastoral needs of today demand that the priest develop the virtue of sound pastoral judgment; the bishop’s responsibility is the ordering of the charisms of the local church, and he shares this with the ordained; the priest and bishop together are about the ordering of right relationships, each where they are called to lead; the

need for pastoral judgment is critical in a presbyterate; and the type of relationships needed to carry forward the mission are to go beyond personality, management dynamics, or other affiliations.

**RS:** Perhaps it is wise to point out that to order the charisms is to willingly and knowingly enter into conflict. Many clergy do not like conflict. To call forth the variety of charisms is to engage all kinds of people with widely differing views. You are often asking disparate people to enter into discernment processes in order to elicit the working of the Spirit. This is to be done constantly, tested out over and over again. It is very trying. The rate of change today is so rapid that we are often faced with making decisions before we can integrate the results of the reflection.

I also believe that we are challenged today to think differently as priests. We are part of larger systems and as such cannot live isolated lives. We are asked to be better at relationships, to enter into the lives of people at the level of faith and the movement of God’s mystery in their lives. This implies a modicum of psychological health, especially in terms of self-awareness. I have seen some priests resort to being authoritarian, having all the answers, with no need to engage. I have seen others abdicate their role and allow the people to make all the decisions. It is difficult to stand in the midst of the church and order the charisms at the same time. We are moving from the model of the priest who creates the community to the priest who serves the *communio* by exercising his unique gifts of ordination.

**HD:** And in this movement to the new model, the identity, role, and relationships of the diocesan priest to the bishop and the local church need our deeper understanding and perhaps deeper compassion.

**RS:** Our compassion and our prayers together as a church.

*This interview was conducted for HUMAN DEVELOPMENT by Sister Brenda L. Hermann, M.S.B.T.*



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# Mergers in Health Care

Gerald A. Arbuckle, S.M., Ph.D.

**M**ergers in health care, especially of acute care hospitals, are rapidly increasing—largely encouraged by the need of health maintenance organizations for greater efficiency, by the growing movement from acute hospital to community care, and by the need for nonprofits to consolidate in order to resist the aggressive competitiveness of investor-owned hospital chains. Within a few years, few Christian-based hospitals will be freestanding. Most will have formed some kind of merger or collaborative action, even with former competitors.

Despite the enthusiasm for mergers in the business world (some call it “merger mania”), the literature on their history is filled with dreary warnings about their negative effects. Rather than increased profitability, mergers have commonly come to be associated with lowered morale, job dissatisfaction, unproductive behavior, absenteeism, and increased labor turnover. A major study by Brian Miller has shown that up to one-third of all mergers fail within five years and that as many as 80 percent never realize their desired results.

The pattern appears little different in health care. Walter A. Zelman, former senior health policy adviser to the Clinton administration, concludes that choosing partners is “the easiest part of the merger process. Finalizing the merger [is] far more difficult . . . [Most] partners find conceptualization easier than implementation. What is planned may never happen; and if it does, it may not do or mean all that is intended.”

The merging of health care facilities can be a way of refounding the mission of the healing Christ in a rapidly changing world. But given the poor record of mergers, it is necessary to clarify the meaning of *merger*, as well as to review the reasons for the failures of mergers and the conditions necessary for their success.

## MERGER: DEFINITION

Confusing technical terms abound in the literature

on business mergers (e.g., *acquisition*, *integration*, *alliance*), and these are indiscriminately transferred to health care. Nonprofits need to be clear about the meanings of these terms and be able to judge whether or not the cultural and human costs involved conflict with their Christian values.

**Acquisition.** This term refers to a method of entering rapidly into a particular market through the purchase of an existing organization or a product/service. The acquisition of a direct competitor is called “horizontal integration”; much of the development of the for-profit hospital systems has been through this type of acquisition. “Vertical acquisition” is particularly characteristic of organizations wishing to foster integrated delivery service (e.g., hospitals that acquire community physician group practices).

In horizontal integration, the acquiring organization may be interested only in the physical and financial assets of the target company, in which case it will basically destroy that organization’s culture through such moves as dismissing most of its staff. The human cost is severe.

**Strategic Alliances or Networks.** These occur when organizations loosely amalgamate while maintaining significant autonomy. The aim is to obtain some long-term strategic advantage for each unit that is impossible for any of the organizations individually. However, though the alignment of cultures is said to be minimal in networks and may be confined to the corporate level of business, there still needs to be some significant cooperation rather than competition. That is, each facility must be prepared to give up some level of independence to allow an overarching administration to emerge, with its own appropriate culture and clearly defined decision-making authority.

In Australia there is a movement to develop regional alliances among Catholic health care facilities. In the United States there are similar attempts to provide better community services and to compete against for-profit organizations. Networks have de-

veloped also across denominational and secular boundaries for the same reasons.

**Joint Venture.** A joint venture is the combination of two or more separate facilities to achieve a definite task to a degree that allows some of the advantages of mergers without the giving up of control. In the mid-1990s in the United States, the most popular form of joint venture was that between hospitals and physicians; hospitals wanted to control their medical care costs, and physicians wished to increase their market security and profits.

However, even though joint ventures allow partners to retain significant control over decision making, the potential for conflicts is considerable unless the partners are compatible. Before joint ventures are entered into, the prospective partners must be as intimately aware as possible of one another's cultural values and organizations. They must also let go of sufficient control to make the venture worthwhile. This will necessitate, as in the case of strategic alliances, the development of a level of cultural oneness sufficient to permit appropriate decision making.

**Merger.** This term is loosely used to cover any of the above strategies. Strictly, however, it refers to the process whereby organizations engage in dialogue as equals, with the intention of producing a single new, more powerful organization with its own culture, not infrequently with a new name. A merger in this sense requires a substantial change in existing organizational cultures. It means identifying the strengths of each organizational culture and using them to form a creative combination. The greater the gap or dissimilarity between the cultures committing themselves to a merger, the more radical will be the changes demanded in existing cultures. Successful mergers require that all parties share a common vision or mission and are prepared to preserve aspects of one another's cultures that conform to it.

## REASONS FOR FAILURE

My own experience and the research findings of others confirm that the major reasons for the collapse of mergers, or for their inability to realize their original expectations, are the following:

**Purpose Unclear.** The need to survive can blind boards of health care facilities to the urgency of asking themselves such questions as, What is the fundamental reason for merging—to ensure survival or to promote the mission? Are our values compatible with those of the partner(s)-to-be? Do our health care facilities have structural problems that no merger will solve?

**Cultural Factors Ignored.** Mergers fail primarily because the leaders involved do not comprehend the importance of culture and therefore are unable to manage the cultural dimensions demanded by mergers. Culture is thought to be something soft, mushy, irrational, and of little importance to people concerned with the hard, measurable realities of finance or profits. The reality, however, is that if there is insufficient cultural fit between the organizations that seek to merge, cultural collisions will eventually destroy their efforts to merge.

Sometimes, in health care, the value systems of cultures are so different that in-depth collaboration is impossible. For example, for-profits view health care as a commodity. Their philosophy is economic rationalism; that is, they maintain that the worth of any delivery of health care is defined by a quantifiable outcome (a “how much health care for your dollar” rationale) and that the provision of health care must be subject to unchecked market competition. The Christian view, however, is that people have a right to health care; the need of the patient is the primary concern, not the economic self-interest of shareholders.

**Unwillingness to Let Go.** The late Cardinal Joseph Bernardin, in his pastoral letter on health care, highlighted a significant obstacle to the merging of Catholic health care facilities: namely, the unwillingness of religious congregations to let go of control and overlook accidental historical differences for the sake of the common mission. “The diversity of the past,” he wrote, “seems to be an impediment to developing the type of collaboration . . . that will allow us to adapt . . . to current trends . . . . Indeed, at times it has been easier for religious-sponsored institutions to join with nondenominational entities than with other Catholic institutions.”

**Inability to Lead.** Mergers, no matter how well prepared, add to existing levels of organizational cultural stress. Unless leaders have the qualities to cope proactively with this throughout the process of merging and developing a new culture, their efforts will fail.

**Patriarchal Authoritarianism.** Some researchers speculate that the drive to build mergers, without adequate sensitivity to cultural and human issues, comes at a time when authoritarian and patriarchal values have achieved renewed popularity in health care and business in general. The economic rationalism pervading Western societies and health care today exalts the “strong manager” who decides things with minimal or no consultation and passes decisions downward.



**Failure to Communicate.** Throughout the merger process, it is virtually impossible to overcommunicate, simply because people adjust to change more easily if they are able to face the known rather than the unknown.

In brief, no merger will succeed unless it is clear to the parties involved why it should take place and what cultural and personal changes each partner must make to achieve collaboration and a new culture to support it. Every organization has a culture, and significant cultural change, such as that required for the integration of health care facilities, evokes turmoil and is financially expensive, time-consuming, and emotionally demanding. The outcome is always uncertain. If cultural issues are not addressed at every stage of a merging process, then collaboration will either fail or fall short of plans.

The instruments for assessing cultural differences, similarities, and compatibilities are still relatively undeveloped, mainly because there is an inadequate grasp of the nature and complexities of culture. Provided that culture is correctly defined and understood, I believe it is possible to rectify this deficiency and formulate a set of guidelines to assist leaders of would-be mergers in health care. The remaining sections of this article lay out basic guidelines for successful mergers.

## BE AWARE THAT CULTURE RESISTS CHANGE

Often, especially in management texts, *culture* is loosely used to mean “what people do around here.” This definition primarily confines culture to what we can see. However, the heart of culture is rarely immediately visible. Culture is not chiefly an entity easily dissectible by the human eye, but a process that is persuasively at work in the unconscious of the group and the individual. Hence, culture is better defined as a pattern of shared meanings and values, embodied in a network of symbols, myths, and rituals created by a particular group as it struggles to adjust to life’s challenges and educate its members about what are considered the orderly and correct ways to feel, think, and behave.

Significantly, culture shapes people’s emotional reaction to the world of people and things. The word *emotional* is important: a culture penetrates the deepest recesses or the unconscious of the human group and individuals, in particular their feelings. Thus culture can be defined simply as “what people feel around here.” Because culture operates most powerfully at the level of the unconscious, it is difficult for people to identify and articulate even their own culture, let alone someone else’s. It is easy to see and de-

scribe what people do, but not to grasp what they feel about what they do.

What people do is called ritual; behind the ritual are symbols and myths. Symbols are felt meanings, and the same symbol can have many, even oppositional, meanings at the same time. For example, a stethoscope as a symbol may evoke feelings of trust and respect for the professional person who wears it, but it may also cause feelings of unease as the viewer recalls the time a doctor used one to diagnose his or her heart condition. Understandably, the meanings of symbols are difficult to discover, especially in cultures quite different from one’s own. This makes cross-cultural communication a tricky, exasperating experience. We may speak another culture’s words yet never comprehend their varied and deep symbolic meanings.

Myths (sometimes called culture stories) are even more complicated. Contrary to popular belief, myths are not fairy tales. Along with symbols, myths are at the center of every culture; they are symbols in narrative form. Myths are value-impregnated beliefs that hold a particular people together, that the people live by or for. Every culture is held together by a complex myth system that shapes and supports all its actions. Myths are the emotional glue of a culture. Interfering with a culture’s myths will evoke strong feelings.

The primary myth of a culture is its creation or founding myth. Founding myths speak about first causes; in them people express their primary understanding of themselves, other people, and the universe. Examples are the Exodus myth for the Israelites, the story of the Pilgrim Fathers for citizens of the United States, and—on a far less exalted level—the story of why and how a health care facility was formed. The creation myth permeates and influences all other myths. When the primary myth is destroyed, the culture disintegrates like a house suddenly robbed of its support beams. The people lose their sense of belonging and identity.

When people experience cultural disintegration, some feel the need to rediscover and relive their creation myth. Through this experience, they seek to reclaim their identity, courage, and self-worth. This repeatedly happens to the Israelites: “When in trouble I sought the Lord . . . Remembering Yahweh’s achievements, remembering your marvels in the past” (Ps. 77:11–12).

Because a culture provides people with a felt sense of meaning, it has a built-in resistance to change. It may be easy to change people’s behavior under coercion, but not their feelings. Even when people agree readily to change in health care facilities at the intellectual level and acknowledge this in a finely worded mission statement, nothing will happen un-



less they adjust their feelings to fit this proclamation of belief. Feelings do not alter easily: when change hits culture, culture wins.

## RECOGNIZE DIFFERENT FOUNDING MYTHS

There are three types of founding myths—public, operative, and residual—and they affect people in different ways. A description of these three myths will explain why the merger in the following case study failed.

**Case Study: Myths Clash.** A central congregational leadership team decided to merge under one administration two of its health care facilities, situated forty miles from each other, in order to provide better-integrated service to the surrounding communities. Improved communications allowed for easy contact between them. The facilities belonged to two different provinces of the congregation, but the congregational leadership considered this to be no problem for two reasons: the provinces belonged to the same congregation, and they had originally been one province.

The team experienced some expected hesitancy on the part of the two facilities in the planning of the merger, but problems intensified once the formal merger occurred. The desired level of collaboration was not reached, and eventually the puzzled team had to abandon the merger.

A *public* myth is a set of stated ideals (e.g., as formulated in a mission statement) that people openly claim binds them together. In practice, however, these written ideals may have little if any cohesive force. The two hospitals in our case study had similar mission statements, and the same congregation had established them. Not surprisingly, it was thought that a merger would be a smooth experience.

But this was not the case, because two other forms of creation myths were not recognized, which led to the breakdown of the merger. An *operative* myth, which actually gives people their felt cohesive identity, can and often does differ dramatically from the public myth. Both public myths stated that the hospitals' primary concern was (according to the mind of the foundress from the last century) the poor. Actually, only one hospital (facility 1 in this analysis) lived that commitment; the second (facility 2) had diverted its energy away from the poor and made the rich its primary focus, and this became its operative myth. Over time, the two facilities had developed different cultures, despite the fact that they belonged to the same congregation. This set up a barrier between the two hospital administrations.

More problems were to emerge as a consequence of not appreciating the power of *residual* creation myths. A residual myth normally has little or no daily impact on a group's life, but at times it emerges to become a powerful operative myth. For example, people of a formerly oppressed nation may relate amicably with the descendants of their former masters, but bitter memories can unexpectedly be revived to create a climate of suspicion and antagonism. These memories are residual myths—which, like all myths, are difficult to identify.

If residual myths are not acknowledged from the beginning of merger negotiations, they will surely erupt to destroy or cripple relationships between would-be partners. This happened in the attempted merger of the two hospitals. Representatives of facility 2 frequently arrived late for merger discussions. Finally a representative from facility 1 complained, "This is typical of them. Over the years they have taken our best physicians and have never supported us in seeking finance for the poor. They do not respect us. We cannot trust them." This was a residual myth, and it significantly contributed to the breakdown of the merger negotiations. The lesson: mission statements are worthless if the operative and residual myths are neglected.

## KNOW CULTURE THROUGH STORIES

**Case Study: Organizational Values Conflict.** Two hospitals—one Methodist, the other Catholic—agreed to merge. In the initial discussions by the two boards, there was general agreement that both hospitals were committed to the healing mission of Jesus Christ, and the Methodist board members said they would uphold the ethical requirements of the Catholic church. Over a period of two years, a formal merger was negotiated, but tensions emerged over different processes of decision making. The Methodist hospital's administrators felt that decisions were being made without adequate consultation; on the Catholic side, administrators were annoyed that too many people had to be asked for their opinions before action could be taken.

A consultant anthropologist was asked to help identify the source of the problem. In a relaxed setting, she asked various staff members to talk about the heroes and heroines of the past. Gradually, the source of the tension came to light. In the Catholic hospital, the heroes and heroines were approvingly described as "strong people"—"real tyrants," but "they got things done." In the Methodist culture, the heroes and heroines were "listening people" who were "always ready to consult."

The way into a culture is through being in touch



with a people's feelings by listening to their myths or stories, not just at the senior levels of staff. It is in stories, not in formal interactions, that one is able to sense what people are passionate about—their values, beliefs, frustrations. There is a distinction, however, between myths and history. Myths contain or have solid foundations in historical realities, but a myth is concerned not so much with a succession of events as with the moral significance of those happenings. Through storytelling, people build emotionally charged images about themselves and their relationships to others. These felt perceptions become personal guidelines for relating to people at all levels of an organizational culture. The images are molded by the ways heroes and heroines have operated within the system.

In the above case study, a pre-Vatican II model of leadership still existed in the Catholic hospital, though the public myth spoke of collegiality, dialogue, and collaboration. By contrast, in the Methodist organizational culture, the public and operative myths were the same; that is, in both theory and practice, the authority structure was based on servant-leadership principles as articulated by Christ. Little wonder that the two administrations clashed.

The merger was put on hold for a year until the Catholic culture could develop a servant style of decision making—one that is nonauthoritarian and collaborative. Over time it became clear to the Catholic hospital's administrators not only that the servant leadership style is gospel-based, but also that without a collaborative form of leadership, it is impossible to survive and grow in the midst of health care turmoil.

### **ACCEPT THAT SELF-KNOWLEDGE IS CHALLENGING**

Once, when I was working with a group of hospital administrators, several expressed exasperation that time was being given to analysis of their own culture: "We know our culture. We live it daily. We are the experts on what it means. We relate easily to one another and to other organizations." In fact, to outsiders they came across as arrogant and opinionated, and until they could see this, negotiations for a merger could not satisfactorily proceed.

The lack of cultural self-knowledge in these administrators is understandable. Recall that a culture camouflages, through its symbols and myths, far more than it visibly reveals—especially for its own participants. To be able to grasp with some objectivity one's national or organizational culture is an achievement of remarkable proportions. Few are able

to do this unaided. Like our personalities, organizational cultures are more obviously visible to others than to ourselves. They are too much part of us for us to grasp them very clearly—hence the need for skilled outsiders to lead people to reflect on an organization's stories and their significance. This slow, often painful process needs to be done in the right atmosphere (e.g., in workshops or retreats), where participants have the space to tell the culture's stories, listen, and ponder the implications of what they hear. Successful mergers depend on such cultural self-knowledge by the partners-to-be.

### **EXPECT CULTURE SHOCK**

Myths, like the symbols that form them, are storehouses of memory, linking people to the past and providing them with the identity and drive to face an uncertain future. Myths also give legitimacy to a culture's economic, social, political, and legal structures. Demolish a group's creation mythology, and its members become confused—even, at times, seriously dysfunctional. No wonder the Israelites in exile had become depressed; their three pivotal institutions—the temple, Jerusalem, and the kingship, which signified for them their election by Yahweh as the chosen people—had been crushed. "By the rivers of Babylon [they] sat and wept at the memory of Zion" (Ps. 137:1).

We are accustomed to seeing entire landscapes destroyed and redeveloped over a short time. In their naive appreciation of the power of technology, I find that economic rationalists in health care assume that the same destruction and redevelopment can be generated within organizational cultures through mergers. This is not so. Symbols, myths, and rituals are not replaced as quickly or easily as buildings or landscapes, or mass-produced as neatly as automobiles or toothbrushes. People experience moments of intense loss, accompanied by the symptoms of grief. Unless the feelings evoked by even rumors of mergers can be surfaced and sensitively confronted, they will linger on and frustrate intercultural communication and desired change.

**Case Study: Morale Disintegrates.** It was decided to merge two Catholic hospitals sponsored by different congregations. The two congregational leaders signed a joint letter in which they stated, in businesslike language, the reasons for the merger, which included the fact that the hospitals could not financially survive alone. They ended the letter by asking all to cooperate to build a better hospital for the community.

The reactions of the nonmedical staff in particular



were unexpected. For example, when members of the congregations involved were seen in the corridors, they were snubbed by staff; efficiency dropped off; significant numbers of people absented themselves from work claiming to be sick; and pictures of the foundresses and early sisters either disappeared or were placed on the floor.

In this case, the congregational leaders felt hurt and puzzled by what was happening. They thought that the logical statement of their financial position alone would prove to people that the decision to merge was right. The letter was academically correct, but it was insensitive to the cultural and personal disruption the decision would evoke. Staff felt that they were being treated as disposable objects and that the organization's core values of justice, compassion, and mercy were being ignored.

### APPRECIATE NEED FOR GRIEVING

In the rush to merge, board members, chief executive officers, and managers may first be concerned about the financial issues. This is dangerously narrow thinking. Recall that the principal reason for the bleak record of merger breakdowns is inattention to emotional responses (i.e., reactions caused by the fear of organizational cultural disintegration and its consequences). For example, when mergers occur, staff fear loss of employment, the breakup of work-related friendships, and the disruption of predictable work routines; if they remain employed, they fear they must learn new skills and worry they will not meet their new employers' expectations.

Grief is the sadness that cultures, not just individuals, experience as the result of significant loss or fear of loss. Grieving is the process by which cultures and individuals adjust to loss. When this loss cannot be openly named, its suppressed frustrations will, in the final analysis, be more profoundly disruptive than the conflictual reactions that seek to express them. The obligation to lead this grieving process rests directly with trustees, board members, chief executive officers, and managers. Formal communications to staff by those in leadership roles need to be sensitively prepared and often repeated because, given the emotional turmoil of changes, people will be slow to hear messages.

These communications are an expression of formal ritual. By *ritual* here I mean any action that conveys meaning in a social or cultural situation. Three types of ritual communication are required to fit three distinct stages of grieving, and because feelings are involved, no stage can be ignored.

**Stages of Grieving.** The threefold stages of grieving

frequently occur in the scriptures. In the Exodus story, the first, or *separation*, stage is when the Israelites experience the trauma of the bleakness of the desert. Moses allows the pain to be expressed; gone are the familiar landscape and plenty of food. The Israelites turn their anger on Moses. Even the oppression they have left looks appealing, as that was at least predictable (Exod. 16:3). Yet Moses, the ritual leader, having encouraged the grief to be named, then rearticulates the vision of the promised land.

Painful times remain for the Israelites during their aimless wandering in the desert. This is the *liminal* stage of the grieving. In this betwixt-and-between stage, they suffer degrees of uncertainty never before imagined. Moses repeatedly allows them to name their pain and losses, but at the same time he rearticulates the vision. When they finally enter the promised land (in the *reentry* stage), they are a newly formed culture intimately united with Yahweh. This happens only because they have disengaged themselves from the past, which took them forty years. This experience serves to remind merger negotiators that organizations are consequences of their past, including their reputations, the kinds of people they hired years before, their locations, and their traditions. All this takes years, if not decades, to alter. People must grieve the loss of the predictable before they can embrace the new.

**Ritual Communications.** To fit this tripartite pattern of letting go into newness, three types of ritual communication are required: reassuring, arranging, and affirming rituals. The *reassuring* communications are in response to the initial shock of a merger announcement. People need to know if their jobs will remain or, if not, that the organization will provide immediate redundancy payments and assist them in finding other employment. Chief executive officers and managers need to make themselves visibly available to hear the reactions of the staff. Communications must be honest, and apologies must be made if the wrong information has been given.

In the liminality stage—that is, the beginning of the actual merger itself—*arranging* ritual communications are appropriate. The vision and mission of the merger need to be publicized to legitimize the changes, and times must be set for the stages of the merger, clarification of new employment roles, and announcement of retraining programs if required. Great patience born of respect for the dignity of the individual is required, and skilled communication is an ongoing imperative. As in phase one, chief executive officers and managers must be available to staff to hear their reactions, concerns, and lamentations. Communications will be frequently repeated, just as



the rituals of grieving led by Moses in the desert were repeated. The third stage, or the phase of *reentry*, is marked by ritual communications that are *affirming*. Staff are informed of achievements, however small, as a consequence of the merging of the health care facilities. All communications must be honest, with no attempt to hide unpleasant realities.

## CLARIFY CATHOLIC IDENTITY

The misconceptions about Catholic identity in health care among Catholic sponsors and potential non-Catholic partners can frustrate merger negotiations. There is a need to dispel such popular assumptions as "employees must attend mass daily" or "facilities are revenue sources for the Vatican." At the same time, while Catholic facilities must adhere to the ethical and religious directives of the church (e.g., the need to avoid all formal cooperation in such activities as abortion), they must also be aware of, and promote, the rich biblical and human foundations of the health care mission, which can foster collaboration with people outside the church.

The mission of the healing Jesus calls us to a holistic understanding of health and health care: "Look, I am making the whole of creation new" (Rev. 21:5). Healing is a process whereby humankind, individually and collectively, struggles to be restored, through the abiding power and love of Christ, to the divine image in which it was originally shaped. According to this way of thinking, where there is injustice, there is ill health; where there is physical, mental, and spiritual suffering without meaning, there is ill health; where there is oppression of the poor by the rich, there is ill health. This understanding of ill health and the need for healing is at the heart of Catholic identity in health care.

## LEADERS NEED RIGHT QUALITIES

Chief executive officers and others in authority, in order to direct the merging of cultures successfully, require appropriate leadership qualities because their task is a daunting one. Ritual leaders of change need the capacity to draw people to a vision of the future and to empower them to work toward it. This presupposes three qualities.

First, they themselves must have come to terms with their own inner fragility and need to collaborate with others in shaping the vision and strategies to achieve it. These are the qualities of a servant-leader, as modeled by the prophets and, finally, in a perfect way by Jesus Christ.

Second, leaders of mergers must be able to relate to their cultures and staff with tenderness and grief.

If executives have not faced up to loss in their own personal journey, they cannot lead with compassion. The world of economic rationalism scorns any sign of feelings as an expression of weakness—something strictly forbidden for sound-headed executives—but the inescapable reality is that managing people is managing feelings. This first means acknowledging one's own feelings.

Third, they must know and be personally committed to the founding myth of Catholic health care. If not, no matter what other skills they may have, their leadership will falter and fail.

## WHEN MERGERS FAIL

Mergers in health care are increasingly common, but it is rare that they ever achieve their desired potential. Sometimes health care organizations merge in the hope that they will not have to change out-of-date structures, but no merger will protect them for long from the realities of contemporary health care.

Mergers frequently fail simply because there is no fundamental compatibility between the cultures and/or because those leading the merger process lack the skills to direct organizational changes in ways that respect the rights and feelings of people and the values of the healing mission of Christ. When mergers fail, managers often look back and admit they were not attentive to cultural and human factors, but in the meantime people suffered unnecessarily, and their organizations were possibly destroyed irremediably.

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